

Pocket Informant

Pro and iPhone 2.50

User Guide



Basic Operations

Here you will learn the system requirements, how to install, launch, and uninstall Pocket Informant



Before Getting Started

System Requirements

Pocket Informant [™] requires the following minimum configurations:

- iPhone (3G, to 4s) ,iPod Touch (2nd to 4th generation), or iPad
- iOS 4.2 or higher

Getting Started

Installing Pocket Informant [™]

Pocket Informant can be installed from a computer by way of iTunes syncing with your iOS Device or over-the-air from the App Store directly to your device.

Special Installation Instructions

Pocket Informant HD for iPad is now Pocket Informant Pro. This is an important item of information because the “Pro” version is a universal application meaning that it will run fully optimized on either the iPad, iPhone or iPod Touch. The iPhone version is still just that, Pocket Informant for the iPhone/iPod Touch only. Outside of the universal status Pocket Informant Pro and Pocket Informant are identical in features and functionality. Following the updates from iTunes, some of you might see two versions of Pocket Informant on your iPhone/iPod Touch. If this is the case you can choose to keep either version. They will not however share any data. If you choose to keep the version without data you can email your database from the other installation and install it to the installation of Pocket Informant that you are choosing to use. Once that is completed you can remove the unwanted version from your device by holding the application icon and tapping the black x over that icon. This operation is detailed in Chapter 8 of this user guide “How to Move a Database”.

Launching Pocket Informant [™]

After installing Pocket Informant, you will see its icon on one of your Application screens. Tap the **PI Pro** icon to launch Pocket Informant and begin using it.

Removing Pocket Informant [™]

Pocket Informant is uninstalled just like any other iOS device application. **Removing Pocket Informant will remove all your data permanently!**

To uninstall Pocket Informant, follow these steps:

Using iTunes

1. Go to the Applications tab when syncing your device and deselect **PI Pro**.
2. Click the **Sync** button in iTunes. This will remove the application from your device.

On Device

1. Hold down the **PI Pro** icon until all of the icons start to “shake.”

2. While shaking, each icon will have an “X” in the top-left corner. Tap the X near the **PI Pro** icon and this will prompt the device to ask if you want to remove the application.
3. Tap **Delete** to confirm that you want to remove the application.

Pocket Informant™ 2.50 whats new?

One for all and all for one...

During the development of Pocket Informant the most common request from our users was the need for a universal application that would run on the iPad and iPhone/iPod Touch. Pocket Informant Pro is now a universal application. The same app that you purchased for your iPad will run on your iPhone/iPod Touch fully optimized for the device that it is running on. Functionally it is identical to Pocket Informant. Some of the more subtle improvements are as follows, polished up parts of the user interface including the Month View, Week View, Date Picker. We've added a groundbreaking new sync service called Pocket Informant Online, which you can think of a Pocket Informant's own cloud sync service. We have made major strides in reliability and improvements to the Pocket Informant support of the iOS calendars. Syncing can now take place with multiple sources, for example you can sync with Toodledo and Google Tasks and Pocket Informant Online all at the same time!



We've summarized several of the new and updated features below;

Improved Reliability: We have worked hard to improve the database handing with Pocket Informant 2.50. What this means to you is greater reliability. We have also revised the methods Pocket Informant uses to access the iOS calendar data, this provides greater speed and reliability if you are an iOS calendar user via Pocket Informant.

Revised Sync Options: Sync options have been revised for more flexibility than ever before. The familiar syncing capabilities with Google Calendar, Toodledo, Outlook on the PC via WDS, and Google Tasks are all available and improved. In addition you can now sync to our own cloud called Pocket Informant Online. It is now possible to use any combination of sync sources. without issue. You can sync your tasks to Outlook on the PC via WDS and your events to Google Calendar and have another sync that is syncing your events in a different Pocket Informant calendar to Pocket Informant Online or any combination of sync services.

Pocket Informant Online: As mentioned above Pocket Informant Online is our new cloud sync service. You can sign up for Pocket Informant Online at www.webis.net. Once signed up you can sync your events and tasks to the only 100% feature matching sync option available for Pocket Informant. Icons, tags and contexts sync and are supported. Unlike Google Calendar/Tasks, Toodledo and the Outlook sync on PC sync via WDS; Pocket Informant Online is a feature for feature match for task and event syncing to your iOS Device running Pocket Informant. We will be adding features to Pocket Informant Online as time goes on so please keep an eye on our website for the latest information and you can do an in app subscription to our newsletter. The subscription area for the newsletter is on the main settings screen right above the version number.

New Color Themes (iPhone/iPod Touch only): On your iPhone or iPod Touch Pocket Informant now has color themes. Try them all and find out which one suits you the best. The new color schemes dramatically change the Pocket Informant user interface and add a new level of customization to the iPhone and iPod touch devices.

Improved Task Hierarchy Display The improvements in the tasks with children view were driven by feedback from our users. Now in the Task View and the in the Today View parent tasks can have the child tasks collapsed into themselves. Or a parent task with children can have its view expanded to show all the children. Also new is the fact that "families stay together" this means that regardless of the grouping the parent and child tasks will be displayed together making it very easy to identify the task families at a glance.

Better and Faster iOS Calendar Support Pocket Informant has better iOS calendar support. We have rebuilt this feature from the ground up for better speed and reliability. We are still bound by some of the iOS calendar limitations however the access is much quicker and the screen wipes that sometimes occurred when using the iOS calendar support are fixed.

Calendar View has a new, less obtrusive, current day indicator: This change in how the current day is indicated in the calendar Month View, was again the result of feedback from our users. The red circle now indicates the current day. The red color makes the current day easier to identify while not being obnoxious in doing so.

Revised Settings Menus-The settings menus have been updated with some new additions to the advanced settings area resulting in some simplification of the more common settings menus. Be sure to check the Advanced section in the settings to see what's new in that view.

iOS Calendars Can Now Use the Pocket informant Editors: Sometimes it can be confusing when you're in Pocket Informant and want to edit an iOS Calendar event, the editor was the actual iOS calendar editor. For some users this was unsettling and confusing. Well with this release that is no longer an issue. You now have a choice in the settings, you can decide if you want to use the iOS Native calendar editor or the Pocket Informant editor. The Pocket Informant editor will only show those items that are supported by the iOS calendars.

Settings Can Now Be Emailed for Backup and Restore Purposes: So you've gotten your Pocket Informant settings exactly the way that you want them and you have another device you want to install Pocket Informant on and use your same settings. Or perhaps you just want to backup your settings. It is now possible to email a settings file for use on another iOS device with Pocket Informant or for a backup file.

Tasks and Events Support Multiple Locations: It is now possible to set multiple locations on a task or an event. Pocket Informant now allows you to "bookmark" your map locations and keep them in a library so that you can call them up quickly for use on other tasks or events.

Simple Task Mode: This new task mode is a basic To Do list. It operates in a similar fashion to the native Reminders application. Nothing fancy here just a basic list that shows active and overdue tasks. This view can also display tasks in their folders. This setting mirrors the task operations in Pocket Informant GO!

Dropbox Support Is Now Available: Pocket Informant now supports Drop Box integration for its database files and for voice notes. This means that you can now backup your Pocket Informant data, preferences and voice notes to your Pocket Informant Dropbox folder. It is also possible to fully recover the backup files directly from the Dropbox back into Pocket Informant. For example if you had a second device running Pocket Informant or had recently reinstalled the application, you can recover your data, settings and voice notes easily and completely from Dropbox.

Revised Calendar and Task Filtering: The user interface for calendar and task filtering has been revised in a simpler design that is just as effective as its predecessor yet is much easier to use.

Getting Familiar with Pocket Informant™

Introduction

Pocket Informant is designed to be easy to use. Every feature in Pocket Informant is designed to be as intuitive and simple to access as possible. This new major update to Pocket Informant, 2.50, builds on previous updates, with improved speed and reliability, some new features and some improvements to the existing ones. To get the most out of Pocket Informant 2.50 please take a moment to read through this user guide. Care was given to make this guide as detailed as possible and to help you as a Pocket Informant user get up to speed as quickly as possible.

Context Location Alerts

Pocket Informant has the ability to set off an alert when you are in close physical proximity to a context with a location assigned to it. The way this works is best illustrated with an example. If you have a task with a context called “shopping” and you assigned the address for the store to the context, Pocket Informant will watch for that store to be in close proximity. If you happen to find yourself near the store, Pocket Informant will sound an alarm to remind you that you have an active task at that location. This feature is activated in the task settings under the main settings tab. It is important to note that this feature uses the device’s cellular radio to determine the location and report changes.

Terminology

The term “iOS Device” in this User Guide is intended to include the iPhone, iPod Touch and iPad. Listed below is a quick explanation of some of the key terminology used in Pocket Informant.

Events	These are appointments, meetings, and Calendar items.
Task	These are the task or “to do” items.
Calendar Item	This refers to something that is either an Event or a Task
Calendar	Each Event belongs to a Calendar. Calendars are directly related to the concept of calendars in Google Calendar or iCal (or "Categories" in Outlook) and can be colored to your preference.
Contacts	These are the entries in the native contacts application. They can be edited within Pocket Informant.
Attendees	These are contacts that have an email address on them. When selected in an event an invitation can be sent to them via email.

User Interface

Pocket Informant has multiple Views to manage your information. Each View constitutes its own area of work. Each of the Views integrates with the others and has a similar interface.








There are seven basic Views, which are selected using the buttons on the Tab Bar at the bottom of the screen on the iPhone/iPod Touch or via the tabs on the iPad.

See Chapter 3 of this guide titled “The Views” for more detailed information on the different Views.

Today	This is a View of today's items, such as Tasks, appointments, alarms, and meeting attendees for today's appointments.
Calendar	In this tab you will see your Calendar in Month, Week, Day, or List View.
Task	You can manage your Tasks from this View. This View contains several pre-defined filters to efficiently find the Tasks you are looking for. It provides quick access to the Inbox, Project, Context, and Next Action groupings. You can also create user defined filters called Smart Groups in this view.
Contacts	The contacts view is a new multifaceted view that allows you to add, edit, delete, call, email, or create events and tasks from a contact.
Notes	The Notes View allows you to type or voice record notes for later use or to be emailed. Text notes will also sync to ToodleDo or to Outlook via the WDS sync.
Search	This iPhone/iPod Touch one View activates the Pocket Informant built-in search engine to allow for quick searching of Contacts, Events, Projects, Contexts, Notes or Tasks. On the iPad each view has a service field that serves the same purpose.
Settings	All Pocket Informant settings are accessed and changed in this View.

Property Icons

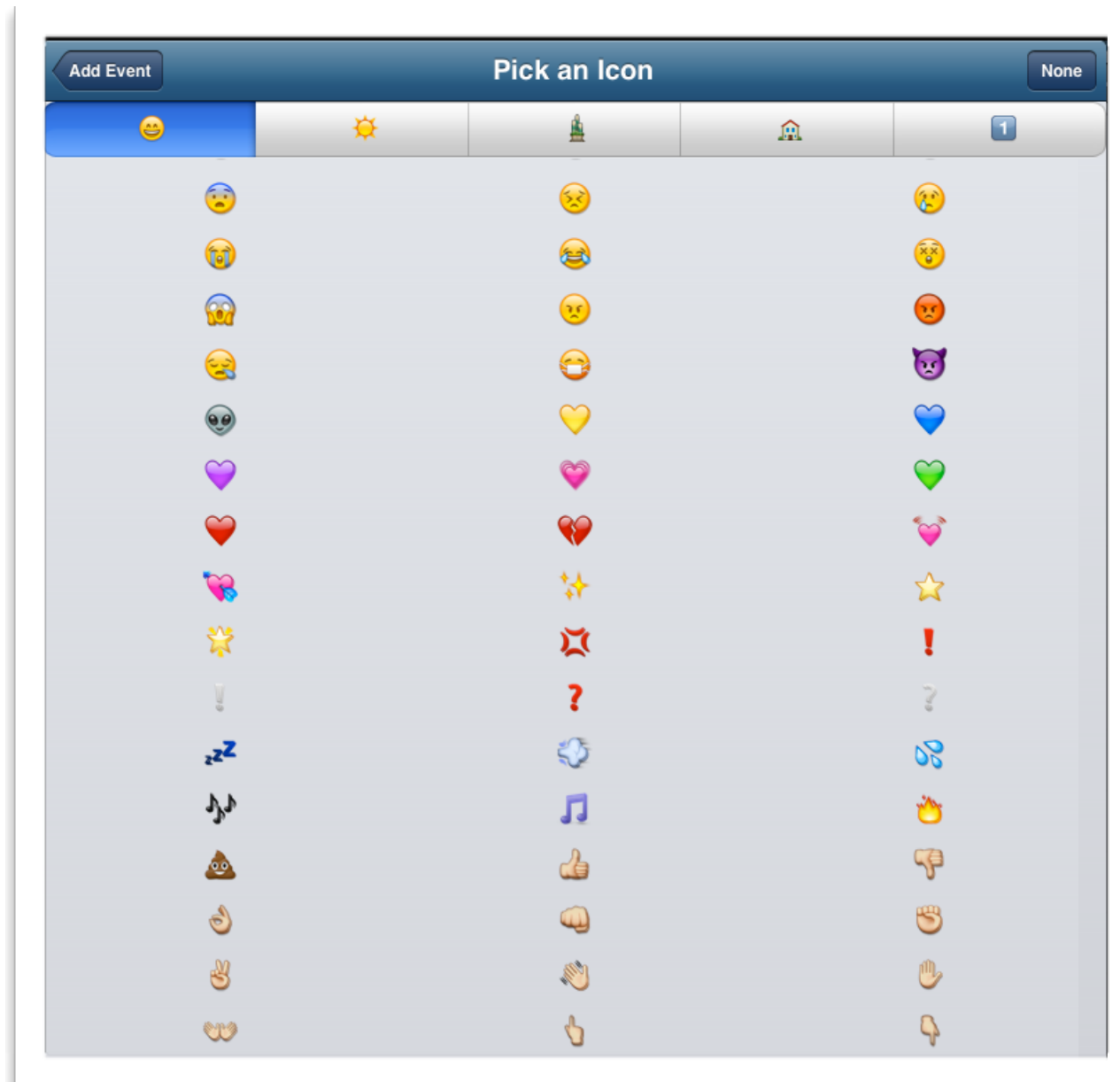
When using Pocket Informant you will quickly find that many of the features and options are designed to provide you with “at a glance” functionality. This means that the items in the Pocket Informant calendars and lists have attributes that allow you to quickly identify them. Below is a list of icons that you could see on tasks and events within Pocket Informant. These icons allow you to quickly identify things, such as items with alarms or recurring items. You can easily identify an item’s property by looking at the icon attached to it. The graphic below shows the property icons and explains their meanings.

<i>Icon</i>	<i>Meaning</i>
	This item has an alarm
	This item is recurring
	This is an exception to the recurrence pattern
	This item has a note
	There is an attendee for this meeting
	You have flagged this Task item
	This task is a sub-task

General Icons

Pocket Informant supports the use of icons on tasks, events, tags, and calendars. Included in the application is a rich library of icons suitable for most any need. The screenshot shows the icon selection screen. Please note that at this time the icons do not sync via any of the available sync options except Pocket Informant Online

Illustration 1.1 iPad Icon Picker shown (iPhone/iPod Touch similar)



Navigation and Editors

In this section we will show you how to navigate in Pocket Informant and how to use the editors.



Basic Navigation

- **Navigation Bar (iPhone/iPod Touch):** This tool bar is located at the top of the screen, just beneath the iPhone status bar. There are different options in the Navigation Bar depending on the View you are in. In many Views, it will have an action button on the left and a couple of plus signed buttons on the right. The plus sign (+) is the **Add** button and is used to add an item to a View — these items can include such things as Tasks, Events, Calendars, etc. The example shown on the right is from the iPhone shown with the Cranberry Leather theme.
- **Tab Bar (iPhone/iPod Touch):** This tool bar is located at the bottom of the screen and is the method used to toggle between the different View options. Scroll left or right to see more buttons. Additionally the buttons on the Tab Bar can be rearranged. To do this simply hold a button until it shakes then drag it to the desired position. To change the appearance of the Tab Bar swipe in an upward motion across it. This gesture will toggle the Tab Bar through its various view options. In the example shown on the right the tab bar is displayed in the Black Leather Theme.
- **Navigation Bar (iPad):** This tool bar operates very similarly to its counterpart on the iPhone/iPod Touch. It is located at the top of the screen under the iPad screen header. There are different options in the Navigation Bar depending on the View you are in. The more common buttons that you will see here are the widescreen, add button, and filter button. In all views a search field is present. When in landscape mode or when opening a menu (portrait view) additional buttons may be visible for other functions in that view.
- **Navigation Tabs (iPad):** These colored tabs are located along the right side of the screen and are used for navigating through the different views of Pocket Informant. Simply tap the tab of view that you would like to see.
- **Gestures:** Pocket Informant supports many of the built in iOS gestures with more coming in future releases. In addition to left and right and up and down scrolling in the Calendar and Task views, Pocket Informant supports pinch and widening when in the day(s) view. This will allow for more or less days to be shown in the grid. The tap/hold gesture in the Calendar View, when used brings up a dialogue for creation of a Task or Event. Below is a list of the behaviors you can expect when creating a task using the Tap/Hold method in the various views.

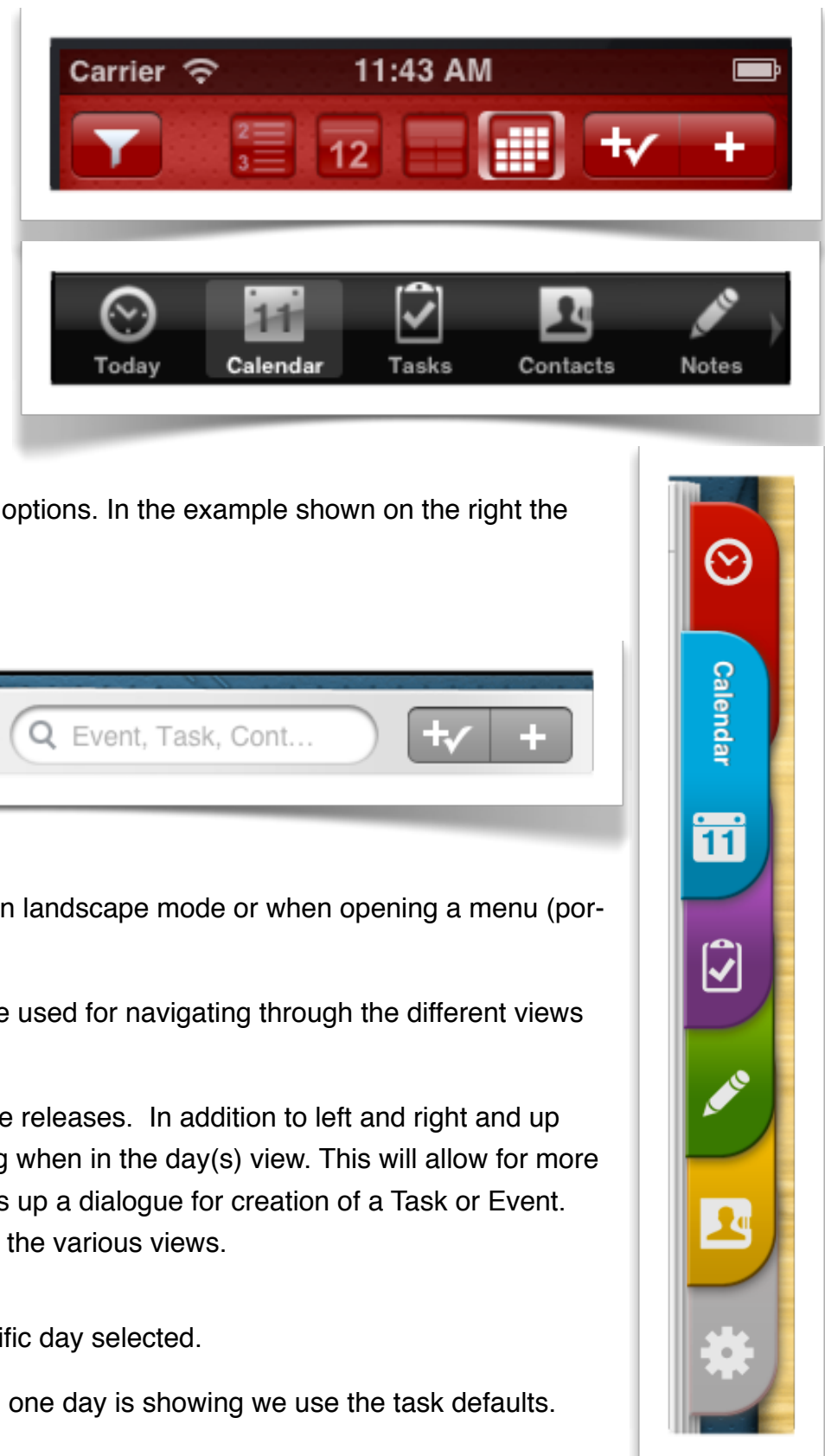
Today View - The current day date is selected by default for the task.

Month, Week, Agenda/List View - Always use the task defaults. None of these ever have a specific day selected.

Month/Week Detail - There is always a day selected so we use that day.

Day View - If only one day is showing, then just like the Today View, we use that day. If more than one day is showing we use the task defaults.

Task View - Always use task defaults.



- **Drag and Drop:** In the Day View you can drag and drop events in the calendar day being displayed. Simply press down on an event until a frame appears around it then use a dragging motion to move the event to the desired start time and let go or “drop”. The event will automatically be edited to show the new start and end times. Please note that the drag and drop of a recurring event only changes the individual occurrence and not the series.
- **Adding Events:** Events can be added from any of the Calendar Views or the Today View. This is done by tapping the **Add** button (+) located in the top right of the view. Tapping this button will bring up an editor that you will use to create an Event. The blanks for creating an Event are self explanatory and easily understood. When all of the information is entered, simply press the **Done** button in the upper right of the editor view to save the new Event. In a Calendar View, you can also tap-and-hold on a date, and the Add Event/Add Task dialog will come up, preset with that date. Please see the Creating Events Overview on page 13 below for more a more detailed explanation of event creation.
- **Adding Tasks:** Task items are added in a similar fashion to Events. From the Task screen or any of the calendar views, tap the **Add** button (Check+) and fill in the blanks. When finished, press the **Done** button in the upper right of the view to save your new Task item. Please see the Creating Tasks Overview below for more a more detailed explanation of task creation.
- **TextExpander Touch:** If you have this application installed on your device it will fully integrate with Pocket Informant bringing with it the ability to enter data faster by using a collection of previously defined snippets from TextExpander. TextExpander is activated in PocketInformant by going to Options->General Settings-> and setting the TextExpander slider to the “On” position. If you would like to purchase TextExpander it is currently available from the App Store.
- **Swipe to Expand Titles:** When using the editor for events, tasks, and text notes you can swipe to the right on the title field to expand the view and see multiple lines of text. This is very useful for long titles.
- **Swipe to Menu:** Several of the items such as contacts, notes, events and tasks can be swiped to open a quick access menu for basic edits or operations pertaining to the item. The example shown is an event on the iPhone/iPod Touch, all others are similar.

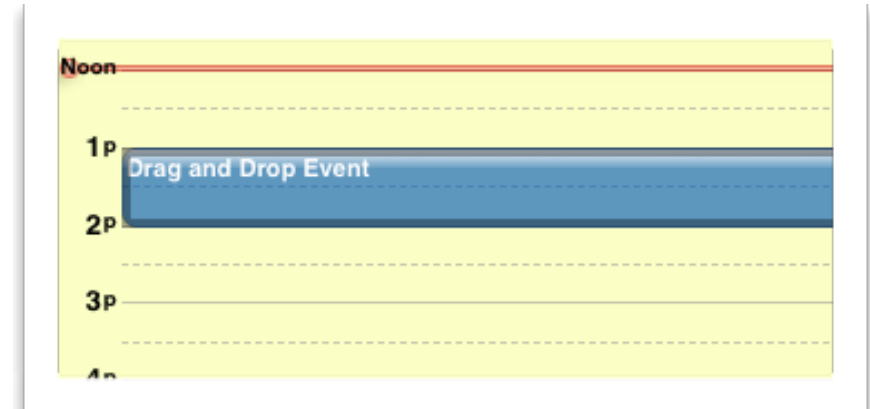
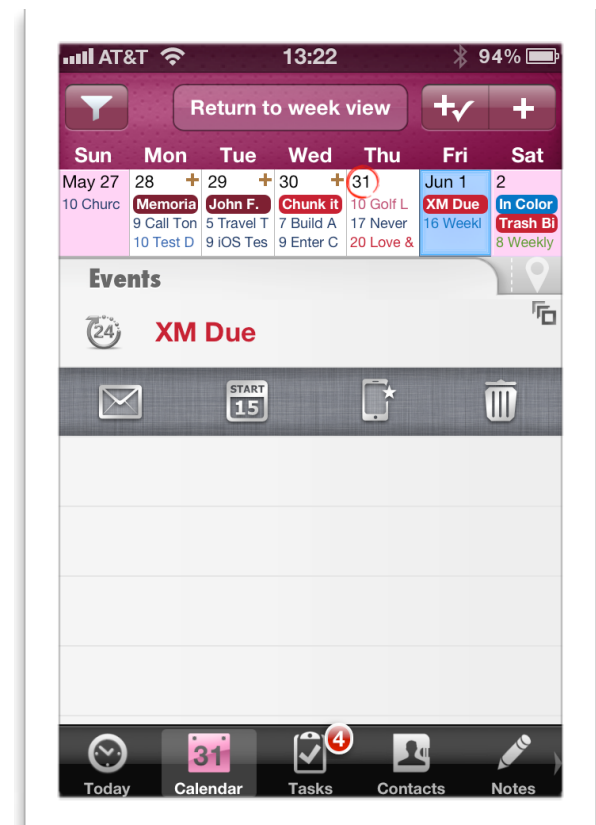


Illustration 2.1 iPhone Swipe Menu shown all others similar



The Editors (Events and Tasks)

Pocket Informant uses the same editor view for creating and editing events. Likewise the task editor that is used for creating tasks is the same editor that is used to make edits to existing tasks. To avoid being redundant the steps/fields involved in event and task creation are identical to those used in editing existing items.

On The iPhone/iPod touch, when using the time and date picker in the landscape orientation it is very important to note that it will behave a little differently then it does in the portrait orientation. The date picker will essentially be shown in four different views. A view for the date selection; a view for the time selection; a view for the year selection and a view for the time zone selector.

These editors are used so commonly within the daily operations of Pocket Informant that we thought it would be a good idea to detail their operation early in this user guide. All of the elements that make up the events and tasks are discussed further later in this user guide. Shown to the right is Pocket Informant for iPhone in the Chocolate Leather theme. The iPad editor is similar.

When creating a new event, task, or note a swipe to the right on the title field will open an expanded view of that field to allow for easier viewing of long titles.

Creating Events (Overview)

The add button located in the upper right of the Navigation Bar, allows you to add new Events directly from any of the Calendar or Today View(s). A tap-and-hold on any day cell will also bring up the "Create Event" screen for that date.

Event creation fields;

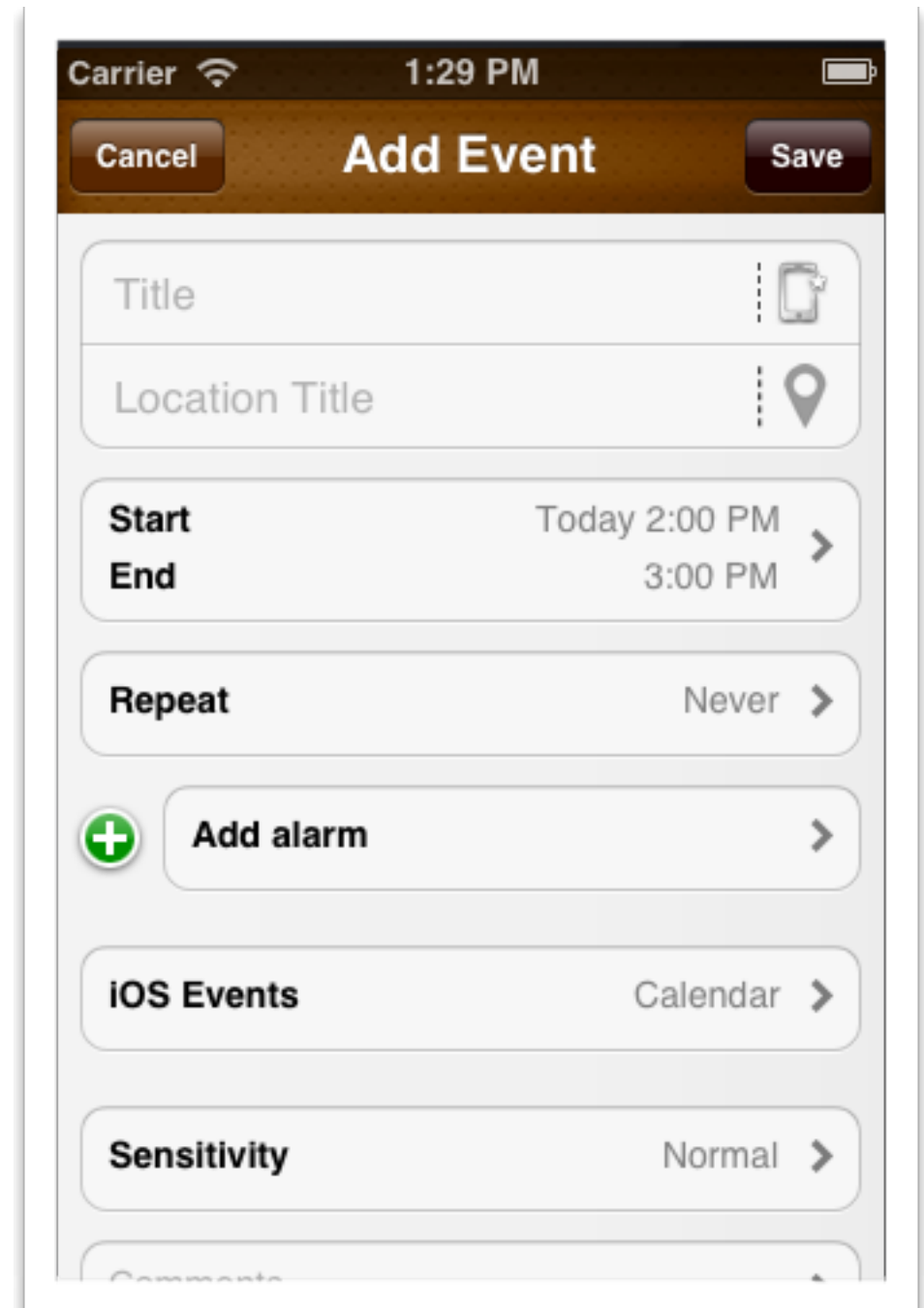
Event Title-This is the place where you will add the name or identifier for your event.

Template Button-Tap this button to bring up the template selection list and tap the template of choice to have that applied to your event.

Location Title-In this area you can type in a location for your event. It can be as precise as an address complete with city state and zip code or as basic as "conference room".

Event Location Manager-This button will open up the map view and allow you to precisely choose the geographical location of your event. See "Event Location Manager" later in this document.

Illustration 2.2 iPhone Editor shown all others similar.

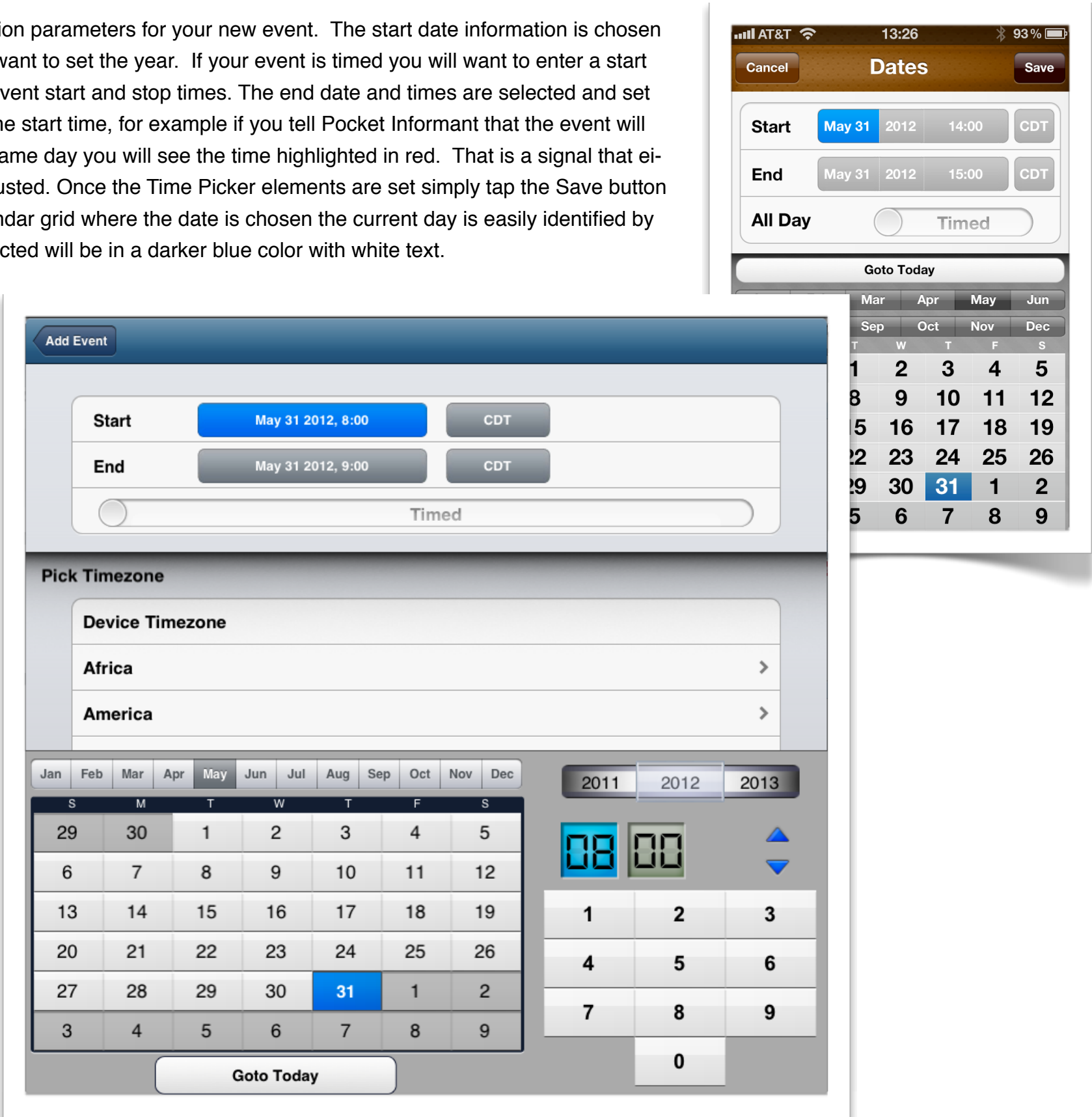


Time Picker-In this area you will determine the duration parameters for your new event. The start date information is chosen by picking a date from the month grid. Next you will want to set the year. If your event is timed you will want to enter a start time. You can also set separate time zones for the event start and stop times. The end date and times are selected and set the same way. If the end time or date conflicts with the start time, for example if you tell Pocket Informant that the event will start at 3:00 pm and will conclude at 2:00pm on the same day you will see the time highlighted in red. That is a signal that either the start time or the stop time will need to be adjusted. Once the Time Picker elements are set simply tap the Save button to return back out to the main editor view. In the calendar grid where the date is chosen the current day is easily identified by the blue coloring with black text. The date being selected will be in a darker blue color with white text.

If your event is an all day occurrence you will want to slide the “Timed” slider to the far right. This will disable the start and stop times and simply list the event as something that is taking place all day.

To set the date of your item to today simply tap the “Goto Today” button.

Both the iPad version and the iPhone version (in the Chocolate Leather theme) are shown.



Repeat-This is the portion of the event creation where a recurrence pattern can be built. Please see “Recurrences” later in this user guide for a more detailed explanation of the how recurrences work and how to apply them.

End Repeat-If you have a recurrence set up and applied to your event this field is where you decide the duration of the recurrence pattern. This can be done by selecting a date or by choosing a specific number of occurrences.

Add Alarm-As the field name implies, this is the area where you select the alarm parameters for the event. An alarm can be set to precede the start of an event by almost any amount of time down to minutes. Multiple alarms can be set for an event.

Add Attendee-Anyone in your contacts list with an email address can be added as an attendee to your event, attendees can be directly notified of the event via Pocket Informant. See “Meeting Requests”.

iOS Events/Calendar-If your default calendar setting in Pocket Informant is an iOS calendar then the next field will be labeled as iOS Events. Here you can set the calendar that the event will be residing on. This will vary depending upon your Pocket Informant configuration. If you have iOS events turned off or have set the default calendar to be a calendar other than an iOS calendar the available fields will look different.

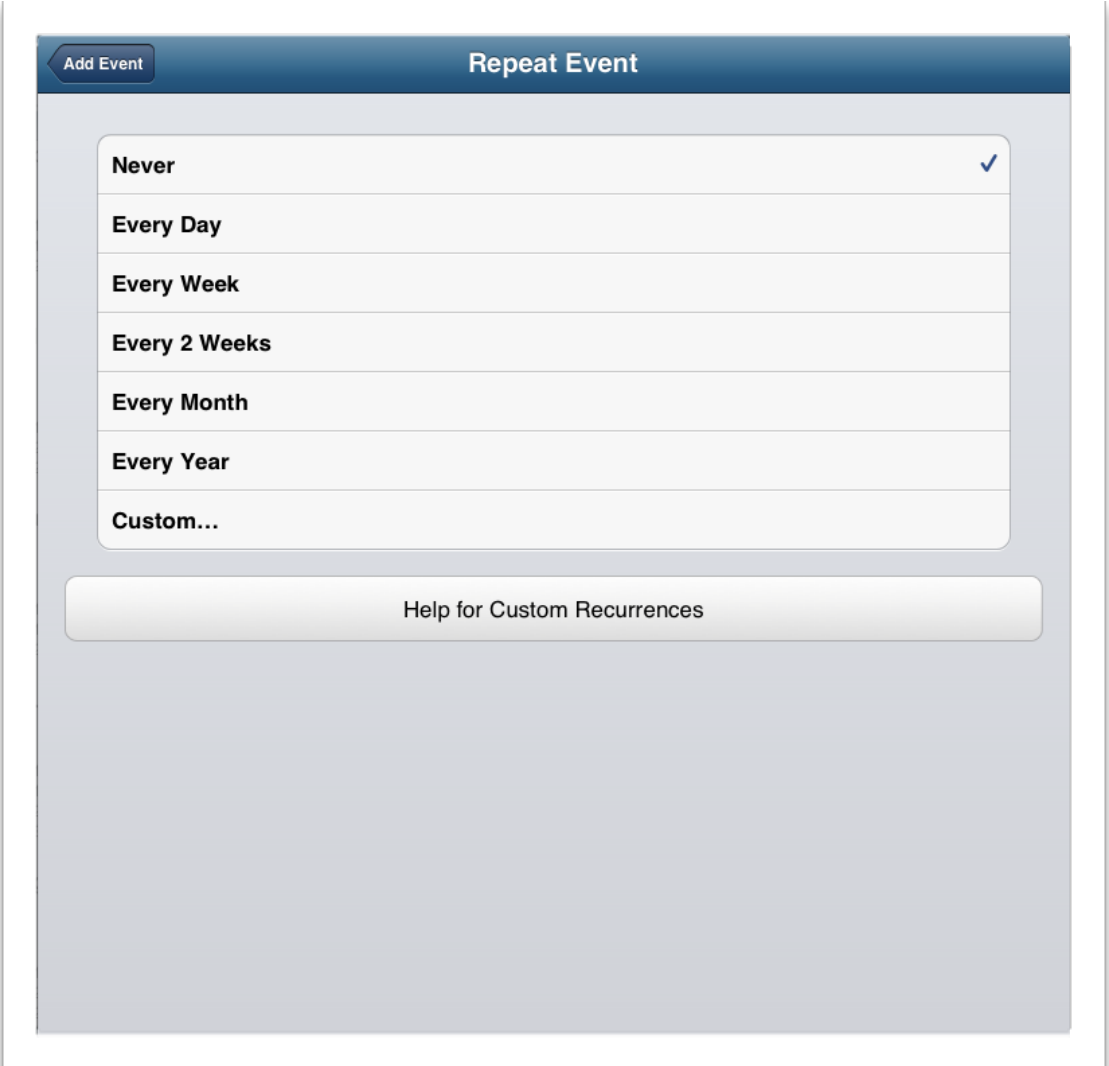


Since iOS is the default we will explain that view through to the end then we will look at the additional fields that are available when a Pocket Informant native calendar is selected.

Following the iOS events field is;

Sensitivity-In this field you can label the sensitivity of the event that you creating.

Comments-In this area you can enter any notes or comments that go with the event.



Sensitivity-This attribute labels an events sensitivity but does not effect the display of the event, the options are Normal, Personal, Private, Confidential.

Comments-Here is where you can enter comments pertaining to the event. This field has no interaction with the Notes view in the application but instead is self contained to the specific event or series of events if they are repeating.

When a Pocket Informant native calendar is selected the following additional fields are available.

Add Attendee-Anyone in your contacts list with an email address can be added as an attendee to your event, attendees can be directly notified of the event via Pocket Informant. See “Meeting Requests” .

Tags-You can “tag” your event to make it easier to filter or to give it a unique identifier when you view it.

Icon-A great visual way to differentiate your event is to give it an icon. Pocket Informant provides a standard collection of icons that can be applied to your event for even easier “at a glance” identification.

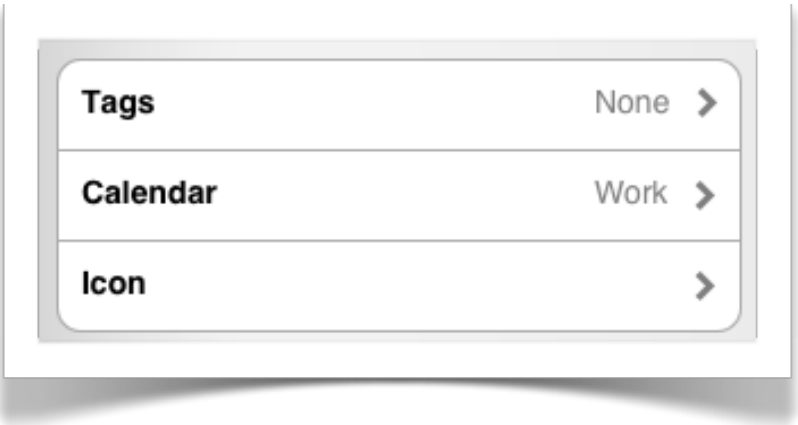
Under the comments field you will see three buttons. These buttons all serve a specific function as outlined below.

Camera-This button, on devices with a camera, will allow you to immediately take a photo and have that photo attached to your event. It is important to note here, that photos taken this way are not added to camera roll of the device and only reside in Pocket Informant on the event.

Photo-You can tap this button to go to the library of photos on your device. You can then select a photo to be attached to the event.

Contact-This button will allow you to add a contact to the event. This is different from an attendee. As attaching a contact is more akin to attaching a business card to the event. Contacts will not receive an email regarding the event.

Once all of the data that you want in the event is there, simply press the “Done” button to add the event to your calendar. If your calendar is syn- ced, pressing the “Done” button will initiate a sync (autosync enabled). If your event is added to an iOS calendar the event will be added to the iOS database a few seconds after pressing the “Done” button.



Camera, Photo and Contacts buttons



Creating Tasks (Overview)

This button (Check Plus), located in the upper right of the Navigation Bar, allows you to add new Tasks directly from the Task View, any of the Calendar or Today View(s). A tap-and-hold on any day cell will also bring up the "Create Task" screen for that date.



To add new Folders/Projects, Contexts, or Tags from the Task main view, tap that item then scroll the screen down. This will reveal the "Add" button.

Please note that tasks cannot be placed on iOS calendars. Screenshots are from the iPhone using the Strawberry Leather theme.

Task creation fields;

Star-This is a button that will activate the star feature of a task. The star will be in view in all of the task views and filtering.

Task Title-This is the are where you will name or identify the task.

Template Button-Tapping this button will bring up your list of task templates. Select the template of your choice here.

Location Title-In this area you can type in a location for your event. It can be as precise as an address complete with city state and zip code or as basic as "conference room".

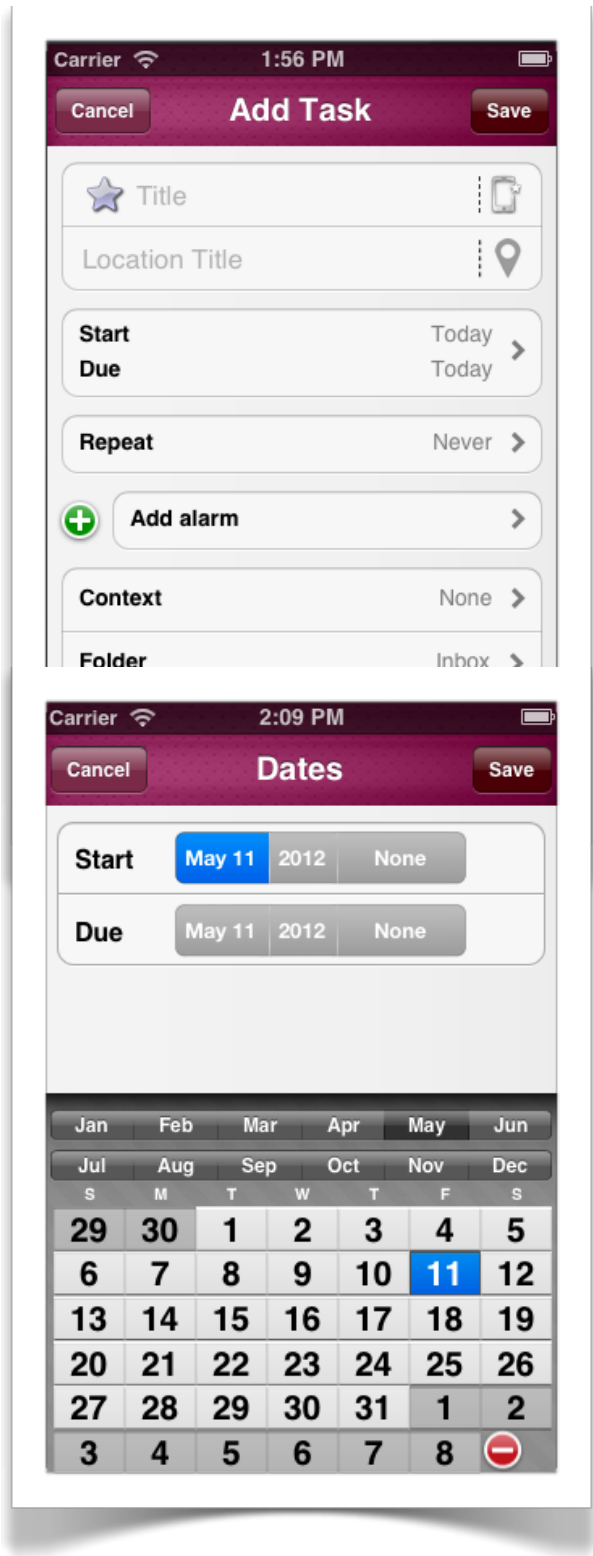
Event Location Manager-This button will open up the map view and allow you to precisely choose the geographical location of your event. See "Event Location Manager" later in this document.

Date/Time Picker-In this area you will determine the duration parameters for your new task. The date information is chosen by picking a date from the month grid. Next you will want to set the year. If your task is timed you will want to enter a start time. Due dates and times are set in the same manner.

If the end time conflicts with the start time, for example if you tell Pocket Informant that the task will start at 3:00 pm and will be due at 2:00pm on the same day you will see the time highlighted in red. That is a signal that either the start time or the stop time will need to be adjusted. Once the Time Picker elements are set simply tap the Save button to return back out to the main editor view. In the calendar grid where the date is chosen the current day is easily identified by the blue coloring with black text. The date being selected will be in a dark blue color with white text. The red badge can be tapped to change the current selection to "None" such as the start date or time. When using the "None" option the date picker will disappear.

Repeat-In this field you can set a recurrence pattern for your task. See "Recurrences" later in this guide for specific information on how to use recurrences. Not Available when using the Simple Task mode.

Illustration 2.3 iPhone Editor shown, all others similar



End Repeat-In this field you will determine the duration of the recurrence pattern that you set up. Not available in Simple Task Mode

Add Alarm-In this field you can set a reminder alarm for your task. The alarm can be set for the date of the task, or days before the task. It can also be set to go off at a specific time if you choose to have an alarm on the day the task is due. Multiple alarms can be set for a task.

Context-Contexts can be added in this field. If there are already contexts existing you can select one from the list, if you need to add a new context that can be done from this view by simply typing in the name of the new context and tapping the “+” button. That will create the new context and assign the task being built to it. See also “Context Location Alerts” on page 6 of this guide.

Folders/Projects-Depending on your chosen task mode this field will appear either as “Folder or Project”. In this field you can select a folder or project for your new task to be assigned to. If need be you can also add a folder/project in this view by entering the name and tapping the “+” button.

Parent-To assign a parent task to the task being created tap this field. It will open a list of tasks, tap the task that you wish to designate as the parent. A task can only have one parent. A parent task can have multiple children.

Action-In this field you can assign an action to your task. Tapping this field will open up the full menu of choices. Simply select the item of your choice by tapping and it will be assigned to your task.

Priority-Set the task priority in this field. Tapping the field will open the priority choices.

Completion Percentage-This slider allows you to set the amount of completion for the task.

Sync To-This field is used to set the sync source that you want the task to sync to. All sync that support task syncing will be visible.

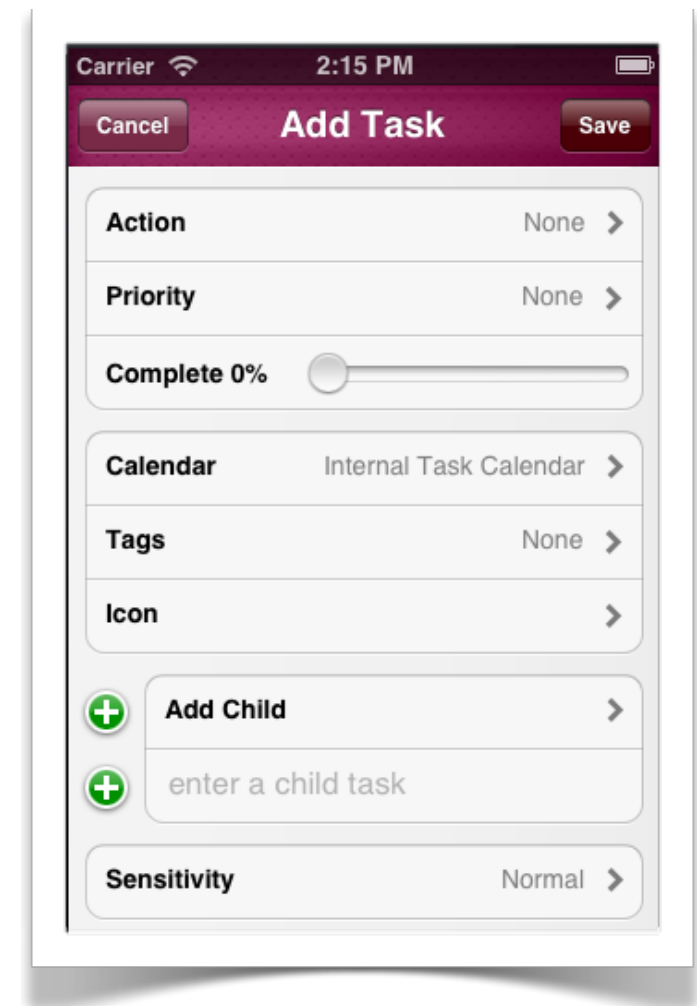
Tags-A tag can be assigned to your task for easier sorting and tracking. Simply tap that field to bring up a list of tags. If you need or want a tag that isn't present simply enter the name you wish to use for the tag and tap the “+” button. This will create the new tag and assign it to your task.

Icon-For quick and easy visual identification you can add an icon to your task. Pocket Informant has a standard library of icons available.

Add Child-If the task your creating needs child tasks assigned to it tap this field to bring up a list of existing tasks. You can choose tasks from this list to be assigned as children to your task.

Enter a Child Task-Tap here to create a new child task. Using this method to add a child task will result in a new (subtask) being created that will inherit the properties of the task you are creating. It will be assigned to your task as a child.

Illustration 2.4 iPhone Task Editor shown all others similar



Sensitivity-In this field you can set the sensitivity level of the task, tap the field to open the menu and select your choice by tapping on it.

Comments-In this field you can add any notes or comments to the task.

Camera-This button, on devices with a camera, will allow you to immediately take a photo and have that photo attached to your task. It is important to note here, that photos taken this way are not added to camera roll of the device and only reside in Pocket Informant on the task.

Photo-You can tap this button to go to the library of photos on your device. You can then select a photo to be attached to the task.

Contact-This button will allow you to add a contact to the task. Attaching a contact is akin to attaching a business card to the task. Contacts will not receive an email regarding the task.

Once all of the data that you want in the event is there, simply press the “Done” button to add the task to your calendar. If your calendar is synced, pressing the “Done” button will initiate a sync (autosync enabled).

Not available in the Simple Task mode are the following editor fields,

Repeat

End Repeat

Context

Parent

Action

Priority

Completion Percentage

Add Child

Enter A Child Task

Illustration 2.5 Camera, Photos, Contacts buttons



The Views

Pocket Informant uses several different views to help you get the information you need as quickly as possible. We will explain these views in this section.



The Views

General Task/Event View Operations

To view the details of a calendar item (Task or Event) tap that item. This will open a new view that shows the item information in detail. In the top of the view there are two buttons. The button with the current date on it will return you to the currently selected view. The **Edit** button on the right will allow you to edit the item currently being displayed. The edit screen is identical to the other editor views throughout Pocket Informant.

In the lower portion of the Event/Task detail view screen there are four buttons. For Events, from left to right, the buttons are Delete (trash can icon), Duplicate (plus sign with paper behind it), Template (iPhone with a star on it), and the action button. Tapping the trash can button on the lower-left side will delete the Event being viewed. The duplicate button (with the + sign) will copy the event and open the editor for the duplicate allowing the user to edit the details before saving. The Template button will make a template out of the event and save it to the templates list. The last button looks like an envelope with an arrow on it.

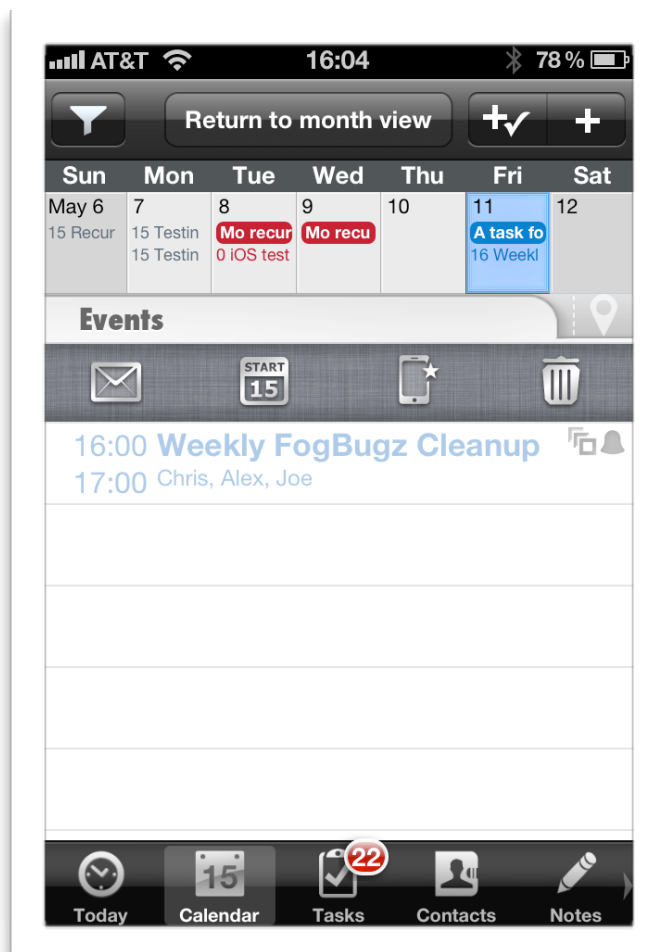
It is an action button that will allow the user to e-mail the event, or convert it to a task.

In the Task Detail view the options are similar, at the bottom of the screen from left to right the four buttons are as follows. Delete (trash can icon), Complete (checkmark), Duplicate (plus sign with paper behind it), and the action button. Just like with the events tapping the trash can will delete the task, tapping the check mark will complete the task, tapping the duplicate button will copy the task and open the editor of the copy. Tapping the action button will bring up a set of new buttons that allow different actions to be applied to the selected task. The options are to to convert the task to a project (more details on this are in the Tasks Section), convert the task to an appointment, save the task as a template which will add it to the task template list, or email the task.

Swiping an individual task or event now opens a short cuts menu (shown at left) that allows for common basic operations to be done. For the Task View these include activating the star, emailing, changing the start and due/end dates, creating a template or deleting the item without ever having to go into the item details.

In the event views it is possible when using the swipe menu to email an event, change the start date of an event, create a template from the event or to delete the event.

Illustration 3.1 iPad Event Detail View, all others similar



In all Calendar Views it is possible to convert an event to a task, and to convert a task to an event. This is done via the action button in the items detail view.

Event Location Manager

This feature is part of the event and task creation dialogue. It gives you specific location information via Google Maps. It's use is very simple. During event/task creation simply tap the “flag” or “map pointer” in the location field. This will take you to a map view where you can see the straight map view, a satellite view or and hybrid view that is the satellite image with an overlay of the map view. At this view you can tap the location or enter location information such as an address or business name. Once selected you will be returned to the normal event creation dialogue to complete setting up your event/task. In the calendar view you can tap the flag in the event view to be taken to the map view. A new sub-feature here allows you to hold a point on the map which will drop a push pin on that location. Entering a city or address that is close to where your event will take place gets you started then you can, using normal scrolling gestures, find the exact location on the map and drop a push pin there. That will be the location assigned to your event. If the location doesn't have a name i.e.; Coffee Shop, then you will need to enter a name. This name will then be displayed on event as the location. This feature is not to be confused with the context location available with tasks and which will be explained later in this guide. In 2.5 it is possible to add multiple events to an item and to have a library of map “bookmarks” so that you can recall locations quickly when creating new events or tasks. Addresses need to be entered in the following format to be as accurate as possible; Address>City>State>Zip. Otherwise they may not be found. If Pocket Informant doesn't seem to find the address you are looking for try entering some variants of it.

Illustration 3.2 iPad Location Selector shown all others similar



Meeting Requests

Select the Attendees cell within the Event creation window to pick an attendee for your meeting. If the contact has more than one email address, you will be asked to pick one of them. When you save the appointment, you will be asked if you wish to send a meeting request. You have two choices to send a meeting request.

- Send via Email

This brings up an email box that you can add text to or simply press “Send” to send a meeting invitation created by Pocket Informant for immediate send. The recipient will have a couple of different options when they receive the notification. If they are a Pocket Informant user they can simply click on the link in the email to have the item added to their Pocket Informant calendar. Other options include an .ics file or all event detail in the text of the email for easy copying and pasting.

- Send via Google

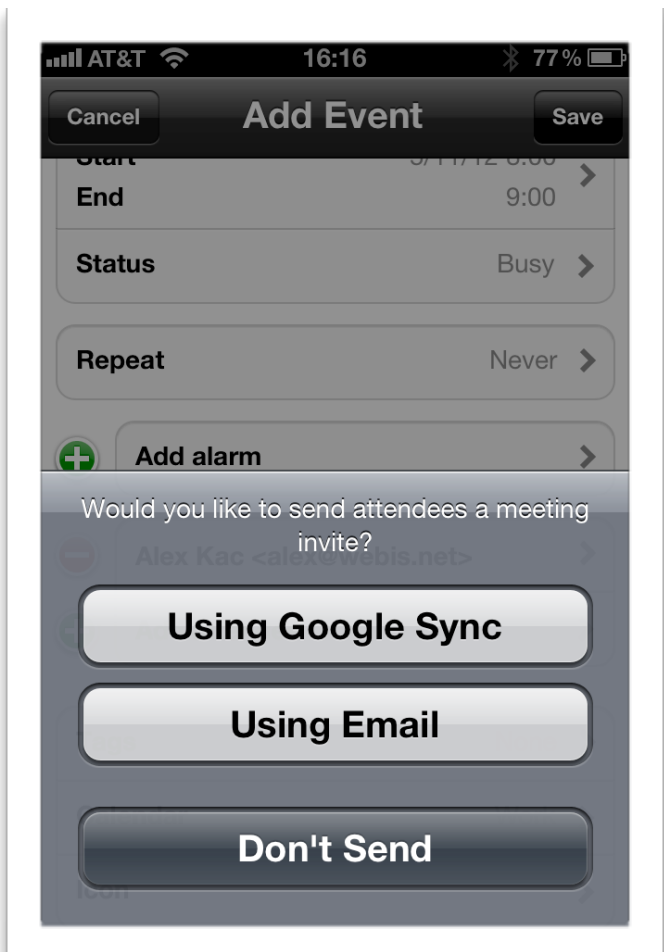
If you have Automatic Sync turned on for Events and are synching with Google then this will request Google to send a meeting invitation for you as soon as the background automatic sync completes.

Recurring Events

Please note that for a contact to be able to be a meeting attendee that there will need to be an email address in that contacts information. Otherwise they can be added to the event as a contact.

On the iPad there isn't a “Don't Send” option, instead simply tap outside of the editor area to close the email dialogue and not send the item.

Illustration 3.3 iPhone Meeting Invite shown all others similar



Recurrences

Pocket Informant supports many complex recurrence types natively and allows you to create all of them within the user interface. You can create simple recurrences in the Repeat Event View and more complex recurrences by selecting **Custom**. Recurrences can be tricky especially with regards to tasks. When setting a task recurrence you will need to decide if the task will repeat from an assigned due date or from the date it is completed. There are several basic recurrence patterns built into Pocket Informant. If none of those quite serve the purpose you can create custom recurrence patterns.

When editing any recurrence pattern upon saving the edits, Pocket Informant ask if you want the edits to be applied to the selected occurrence, all or all future. These are self explanatory choices.

When editing a recurring item in the Day View using the drag and drop method, only that occurrence of the item is edited. All future and past occurrences will not be edited as a result of this operation.

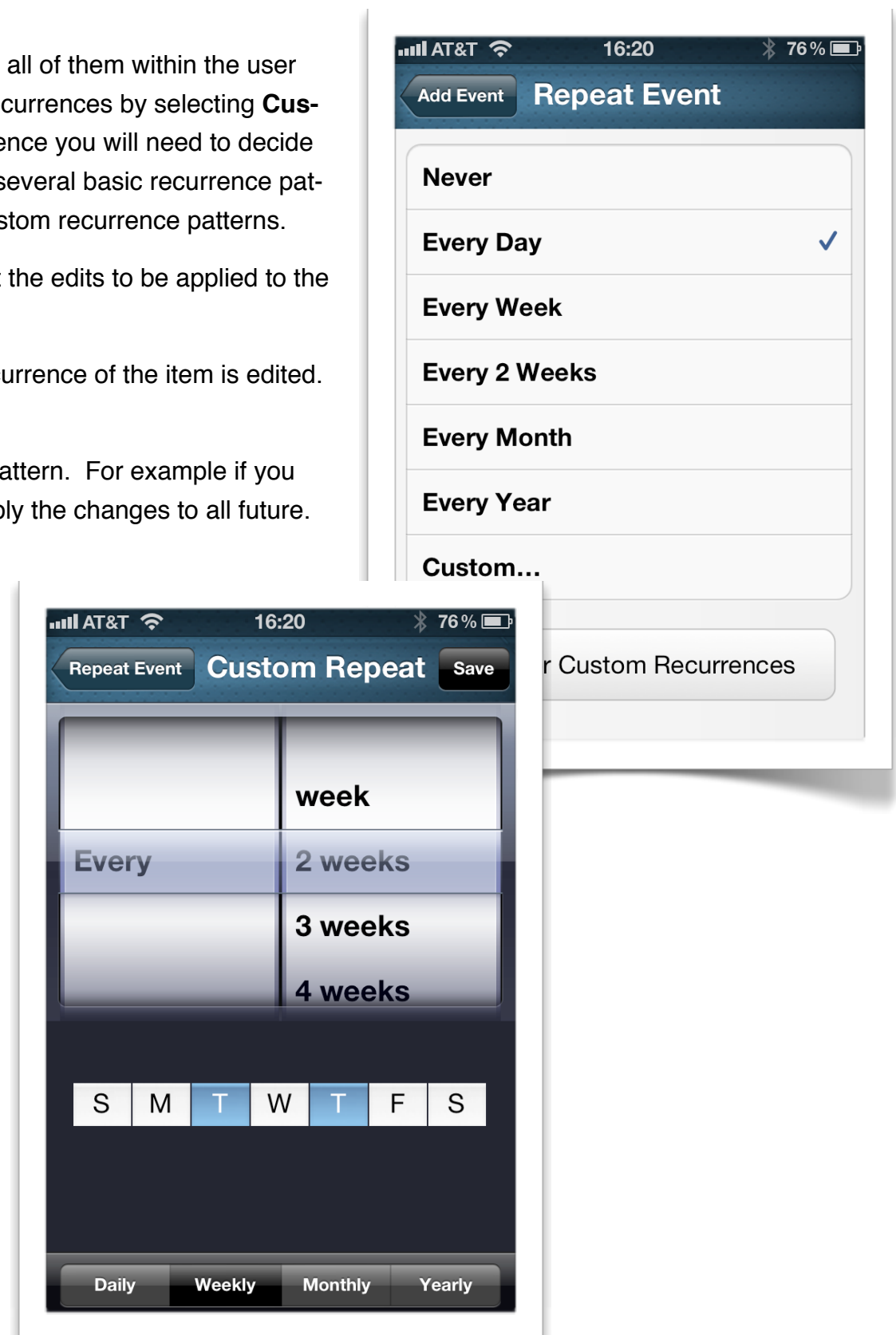
Also when editing any recurrence pattern, be mindful of where you are at in the recurrence pattern. For example if you have a ten recurrence pattern and edit the eighth recurrence and tell Pocket Informant to apply the changes to all future. Then the recurrence pattern you are in will stop with that eighth occurrence and a new pattern will start the encompasses all of the remaining occurrences.

So now if you were to go back to the second occurrence of that pattern and make an edit and apply the edit to all future, that edit would only go to the eighth occurrence not the ninth or tenth because after the eighth a new recurrence pattern was started.

Once you press **Custom** you can create the following recurrence types directly within Pocket Informant:

- Daily — Every “x” number of days.
- Weekly — Every “x” weeks on any custom combination of days such as “Sunday and Wednesday” or “Monday-Friday.”
- Monthly — Every “x” months on any custom combination of days such as:
 - 5th and 19th of the month.
 - The first Monday of every month.
 - The last day of the month.
- Yearly — Every “x” years on any custom combination of months, such as:
 - Every January and June
 - The first Sunday in October every 3 years
 - The last weekday of every July

Custom recurrences for both tasks and events are one of the more complicated operations that Pocket Informant supports. To help you get the exact recurrence pattern you are looking for there is now a help button at the bottom of the recurrences screen. Tapping this but-



ton will walk you through the various custom recurrence patterns that Pocket Informant offers and how to set them up. Additionally this is a good review for long time Pocket Informant users. It is always available as a resource when setting up a custom recurrence pattern.

The task recurrence rules are very similar, however, when creating a recurring task you will need to decide if the task will repeat from the assigned due date or the completion date. Once this attribute is set it cannot be changed.

Add Buttons (+)

These buttons, located at the top right of the View, activate the editor and will allow you to add new Events and Tasks directly from the currently selected view.

Calendar/Tag Filter Button

The Calendar Filter button is in the top left of the Today, Calendar, Task, and Notes views. It is the one that looks like a funnel. To learn more about this feature, read the section on [Calendar Filtering](#). When a filter is in use the button will change to a view with four boxes on it.

Tasks in Calendar View

List, Week, Day and Month Views can be configured to include tasks in either “In Progress” or “Due and Over-due” modes. The In Progress mode will display a Task on every date which that Task encompasses. For example a task due a week from now will show up on every day from now until that due date. A Task which has a start and due date will show up on every date between those dates.

In Month View, if you are showing Time Bars, then Tasks will appear as red badges over the day they are due. If you are in mini-text mode, then the Task will be listed in the month cell itself with a "completion" circle next to it indicating it's a Task. In Week View, these Tasks appear under your events in each cell, again with the "completion" circle next to them. In List View, Task cells will appear along with event cells.

You can also configure Pocket Informant to display completed tasks or to exclude them in the various calendar views. The menu options for doing this are self explanatory and can be found near the bottom of the Calendar Settings which can be found on the main settings screen.



Today View

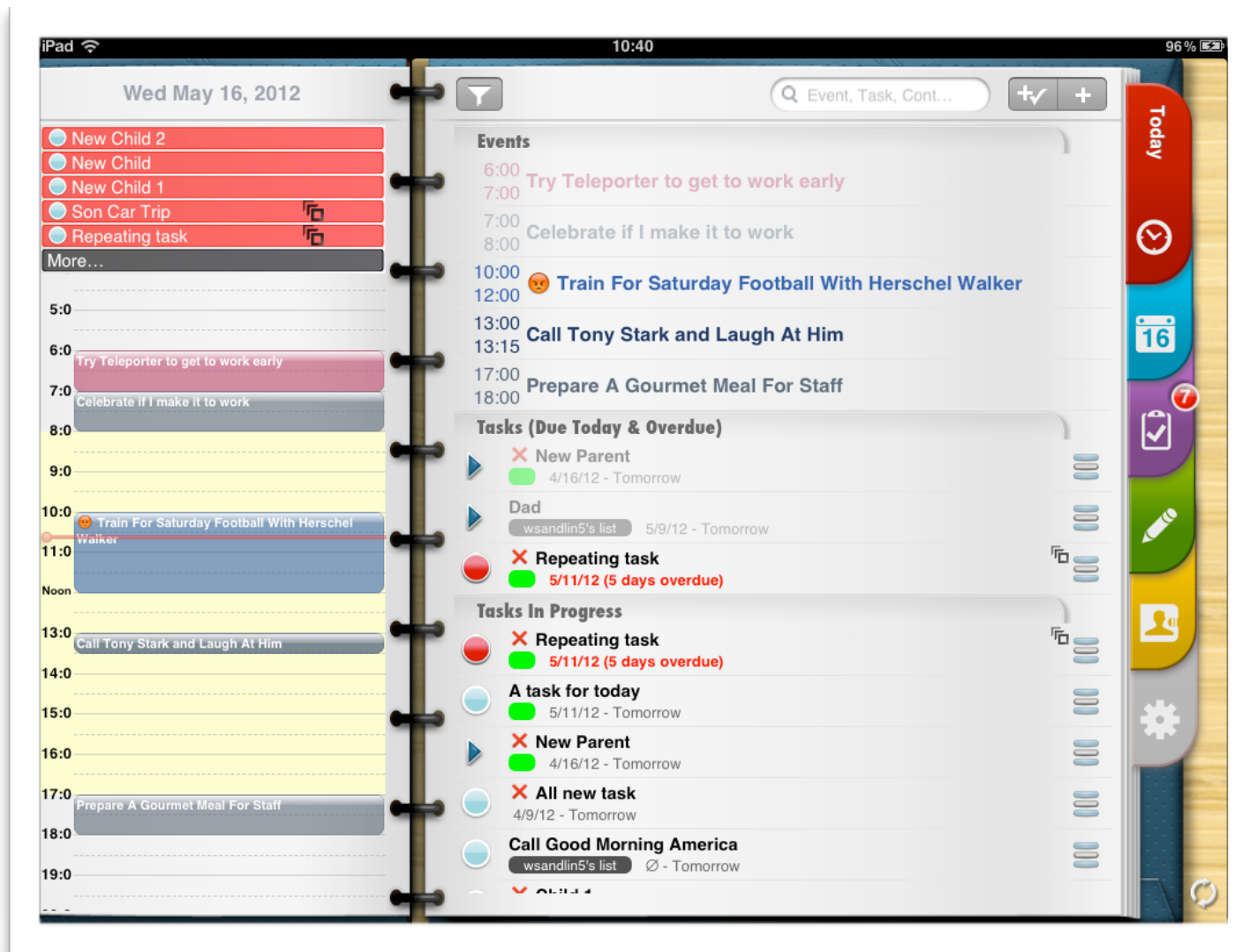
The Today View shows you the Tasks and Events occurring on the current day at a glance, as well as current Next Actions, Meeting Attendees, and Alarms. All of these sections are user configurable in the settings.

This View allows you to simply tap an Event or Task to view its details, such as location, attendees, and comments. You can also add Events and Tasks directly from this screen.

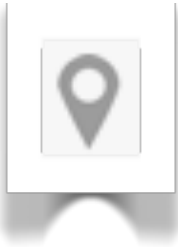
To move through multiple Events or Tasks quickly, up-and-down scrolling is available in this View. By default, the color of the title text for the Event will match the Calendar that the Event belongs to. You may also configure this View so that the background of the cell shows the color instead of the text. Events and Tasks may have one or more system icons displayed in their cells to give you some quick information about this item at a glance. Refer to the table on page 9 of this document for an explanation of these icons. Users may also select icons from the built in library to add their own unique identifiers to tasks and events. We have updated how parent and child tasks are displayed. A parent task can now have the child tasks collapsed into itself in this view to open up more screen real estate when needed. Simply tap the triangle on the left of the parent task to expand or contract the child tasks in the view.

The iPad version is shown (Illustration 3.4), iPhone/iPod Touch are similar but without the left side graphical view.

Illustration 3.4 iPad Today View Shown



If you have an event with a location attached to it then you will see the map button just below the event add button. Tapping that button will show you a map with your event location(s) shown as numbered flags. Only events that have locations on them will show on the map. Also tasks with a context location a will display a similar icon when viewed in the Today View. The map symbol looks the map icon shown here.



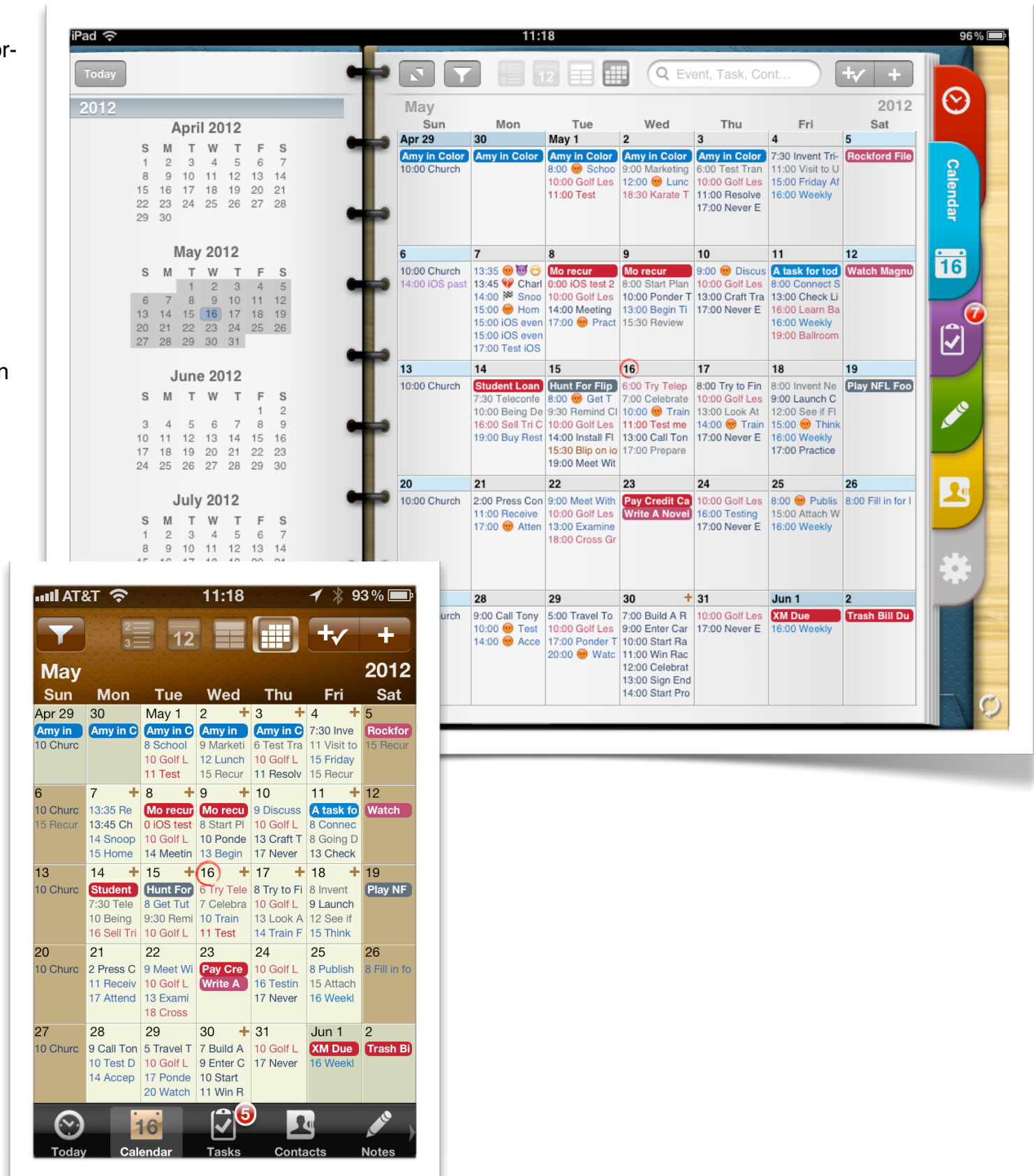
Calendar View

The Calendar View is one of the most important Views in Pocket Informant. This View will allow you to select from multiple types of Calendar Views: Day, Week, Month, and List Views. Events and Tasks can be added and edited from here. Calendar colors appear in these Views with the Event title and other Event information. You can also display tasks with a variety of options within each calendar view. These attributes will be discussed in further detail below.

Events and Tasks can be edited from any of the Calendar Views by tapping the item. This will show more Event detail and show the **Edit** button on the right side of the Navigation Bar. Tapping the **Edit** button will bring up an edit screen that is very similar to the Add Event screen. Once you are done editing, simply tap the **Done** button to save your changes.

On the iPhone and iPod Touch single tapping of the calendar button will return the view to the current date, on the iPad tapping the Today button will do the same thing. Additionally on the iPad, thanks to the extra screen real estate, tapping on any of the months will change the right side view to that month.

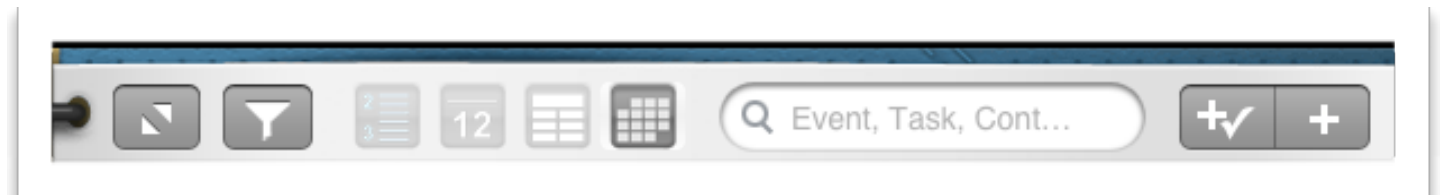
A similar feature is available on the iPhone and iPod Touch. By double tapping on the calendar button in the tab bar the “Jump to Date” dialogue will open.



Calendar View Selection Buttons

On the iPad in the horizontal orientation each of the calendar views described below are accompanied by a calendar list. This list is scrollable and a date can be selected from it. The selected date will be visible in the calendar view. When using your iPad in the portrait orientation the pop up menu works in the same fashion. In the top center of the Calendar View are the main Calendar View selection buttons:

iPad Calendar View Selection Buttons

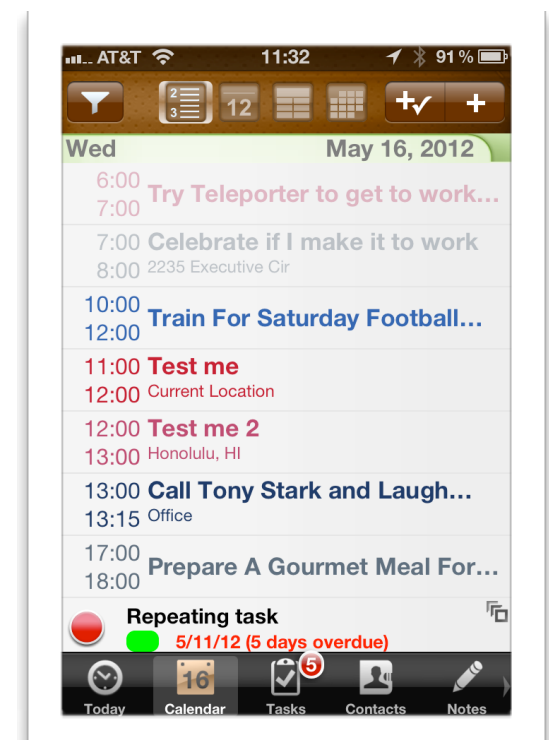


iPhone/iPod Touch Calendar View Selection Buttons (Below)



Agenda/List This button shows a List of all the Events and Tasks stored in Pocket Informant. Individual items can be selected to see more detail and for editing. Scroll down for older events and tasks, scroll up for current and future tasks and events. When scrolling down for the older events a button labeled as “Previous Events” will be displayed from time to time. Pressing this button will add older data to the view and allow you to scroll through it. You can press that button as many times as you like to see data as far back as Pocket Informant has data. When scrolling down or forward in time the list may “bottom out” this only occurs when Pocket Informant is loading more data to display. Depending on how far into the future you are going you may see this occur several times. This is the normal operation of Pocket Informant and does not indicate any kind of malfunction. The scrolling motion simply occurs faster than it is possible to load data so the bottoming out occurs while data is being loaded into the view. This should happen very quickly.

Illustration 3.5 iPhone Agenda View shown all others similar



Day(s)

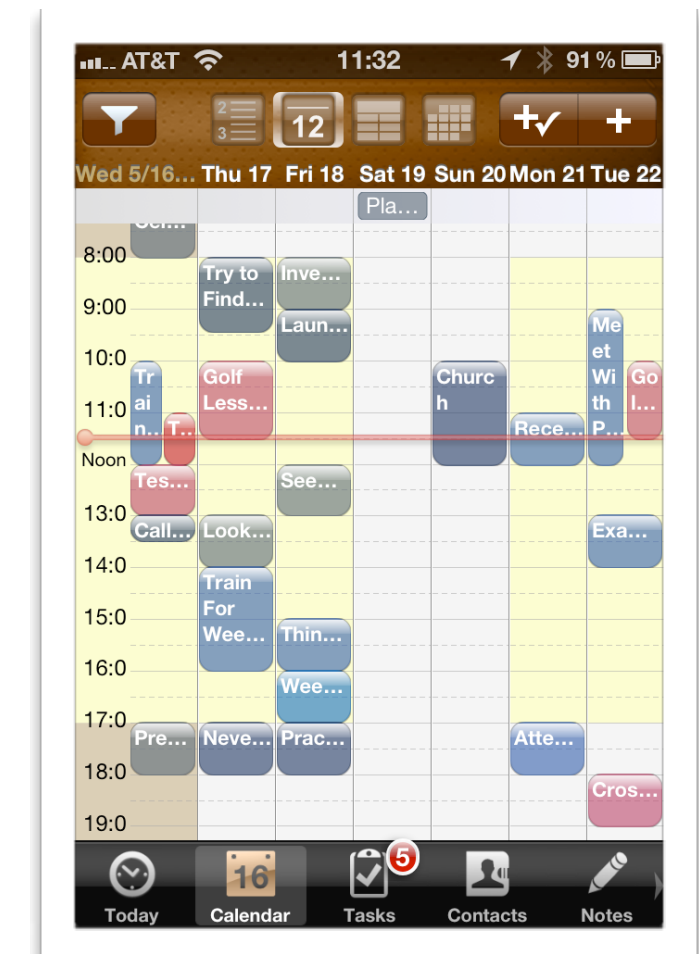
The Day(s) View displays information for single or multiple days. Event bubbles cover the duration of the Event and are the color of the Calendar that the Event is stored on or the tag if Tags are used. Navigation in this Calendar View is also done by swiping up or down for the selected day or left and right for switching between days. Holding down a time will bring up the add task or event dialogue.

The Day(s) View features a red line to indicate the current time. In this view it is possible to drag and drop events to new times and dates. To use this feature hold your finger on an event and watch for the outline to appear. When it does you can then drag the event to the desired start time within the grid, then simply “drop” the event by removing your finger from the screen. Pocket Informant will automatically edit the event with this new start time and will append the end time as well. Depending on the number of days showing tasks and events that cover multiple days now have indicators that elude to such and allow you to know at a glance that a task or event is continuing.

Please note that when dragging and dropping an event that is recurring that only the single occurrence of the pattern will be edited.

Items that cross over days will have a jagged edge to show that they are not complete.

Illustration 3.6 iPhone Days View shown, all others are similar.



Week

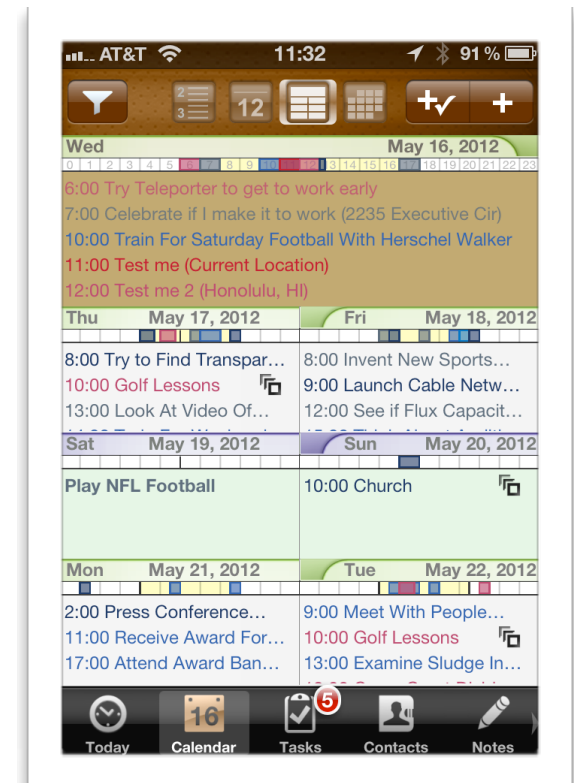
The Week View allows you to see seven days at a time in a staggered formation. You can configure which day you would like to see on top (any day of the week or "Today"). Each day "cell" includes a "time bar" at the top with the Event listing below that. The time bar is a graphical representation of the hours in a day with Events shaded in. (The left-hand side of the time bar is 12:00 A.M. and the right-hand side is 11:59 P.M. for that day.) The yellow-shaded area represents your work hours, which are selected in the Settings tab. This time bar while highly useful is an item that can be turned off if desired. Events and Tasks in this view can be tapped to view their details.

You can swipe left or right to move between weeks in this View. Tapping a day cell on the iPad will open a summarized view of the day, items in this view can be tapped to see even more detail or to be edited. It is also possible to add tasks and events from this view. Simply tap the "X" in the top left of this view to exit it.

Tapping a day on the iPhone will take you to another view known as the Week View Detail. Here you will see the currently selected week as a row of cells along the top of the screen. The current day will be indicated with a red circle around its date, the selected day will be shaded in light blue. Below the row of cells is the list of events or tasks (if enabled) for the selected day. Individual items can be tapped from the list to view/edit their details. The row of week view cells at the top of the screen can also be scrolled left and right to go to dates in the future or the past. To go back to the Week View, simply tap the **Return to Week View** button at the top of the screen.

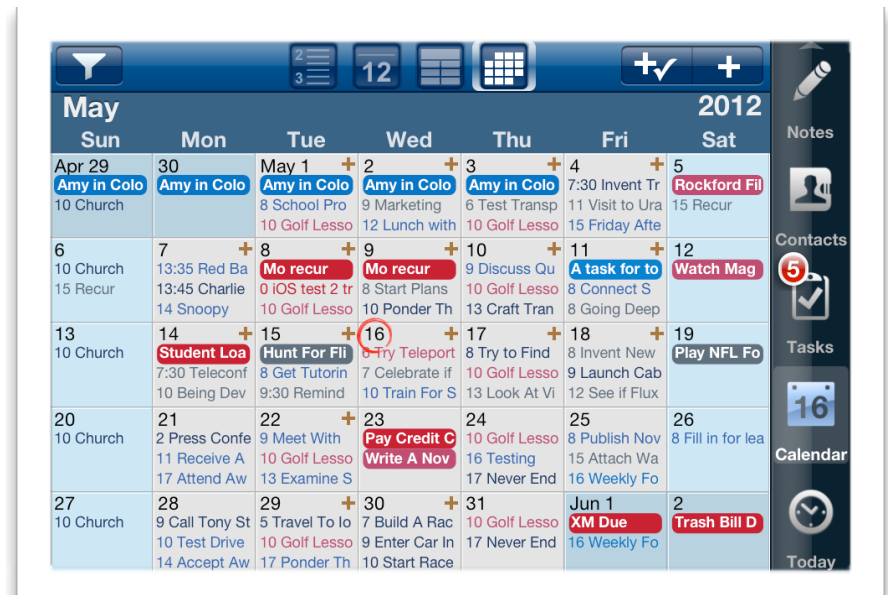
You can add an event or task by simply holding down a specific day, this will take you straight into the create event or task dialogue. Or you can use the event and task add buttons in the top right of the view.

iPhone Week View and Month View shown all others similar



Month

The Month View (see page 28) is very similar to the Week View in its behavior. Swiping left or right allows you to navigate between months. Tapping the month name brings up the "Jump to Date" picker discussed above. Tapping on a specific day will bring you to the same horizontal "detail" Week Row View described above.



Month Cell Style

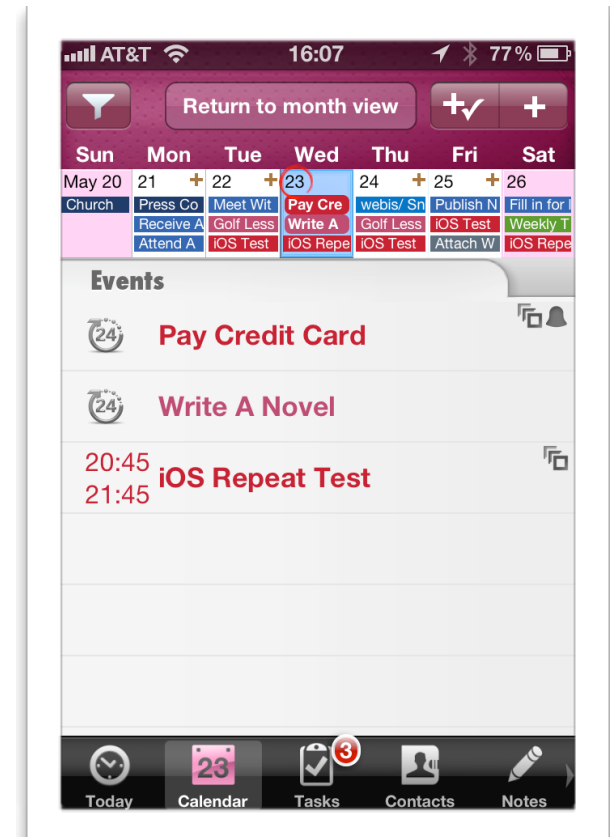
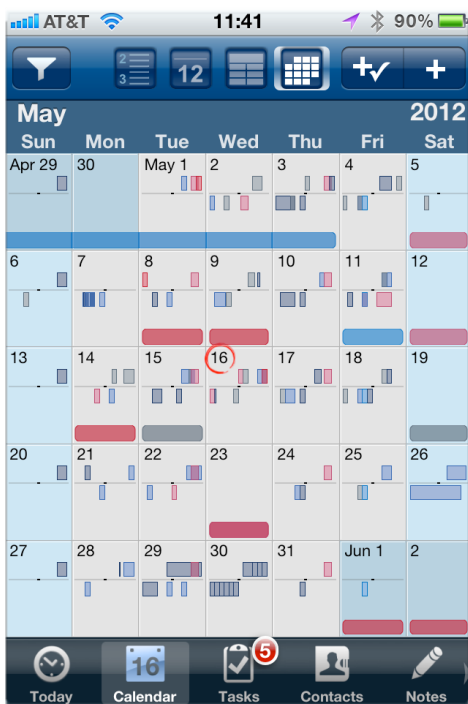
The cells in the month view are capable of displaying your Task and Event information many different ways. The default is Mini Text with Time. This will display your event title and the time in the cell. In the settings of Pocket Informant are many other display options for the Month View cells, these include Mini-Text, Mini-Text with colored background, Icon View, and Numbers only mode.

Pocket Informant's time bars are an innovative feature that allows you to quickly see how your day and weeks and months are filled by different kinds of appointments. The time bars in the Month View are slightly different than the ones in the Week View; a gray line separates A.M. and P.M. (with A.M. being on top). The top left of the time bar is 12:00 A.M., with the top right being 11:59 A.M. The bottom left of the time bar is 12 P.M., with the bottom right being 11:59 P.M.

However not everyone needs or wants to use the time bars. There are other view options available. These are Mini-Text, Mini-Text with time, Mini-Text with colored background, Icon View and Numbers only mode. Here is a little more detail for the other Month View cell options that were mentioned above, Mini text shows the information in a very small font within each cell and can

be configured with different options, such as time display or with a colored background to make identification easier. Numbers only displays a simple number in the cell much like the built-in Calendar. The icon view shows only the events with icons on them, which allows them to be identified quickly and easily.

On the iPhone a single tap on a day will take you to the Month Detail View. Here you will see the currently selected week as a row of cells along the top of the screen. The current day will be indicated with a red circle around the date. The selected day will be shaded in light blue. Below the row of cells is the list of events or tasks (if enabled) for the selected day. Individual items can be tapped from the list to view/edit their details. The row of week view cells at the top of the screen can also be scrolled left and right to go to dates in the future or the past. Press the "Return to Month View" button to return to the entire month view.

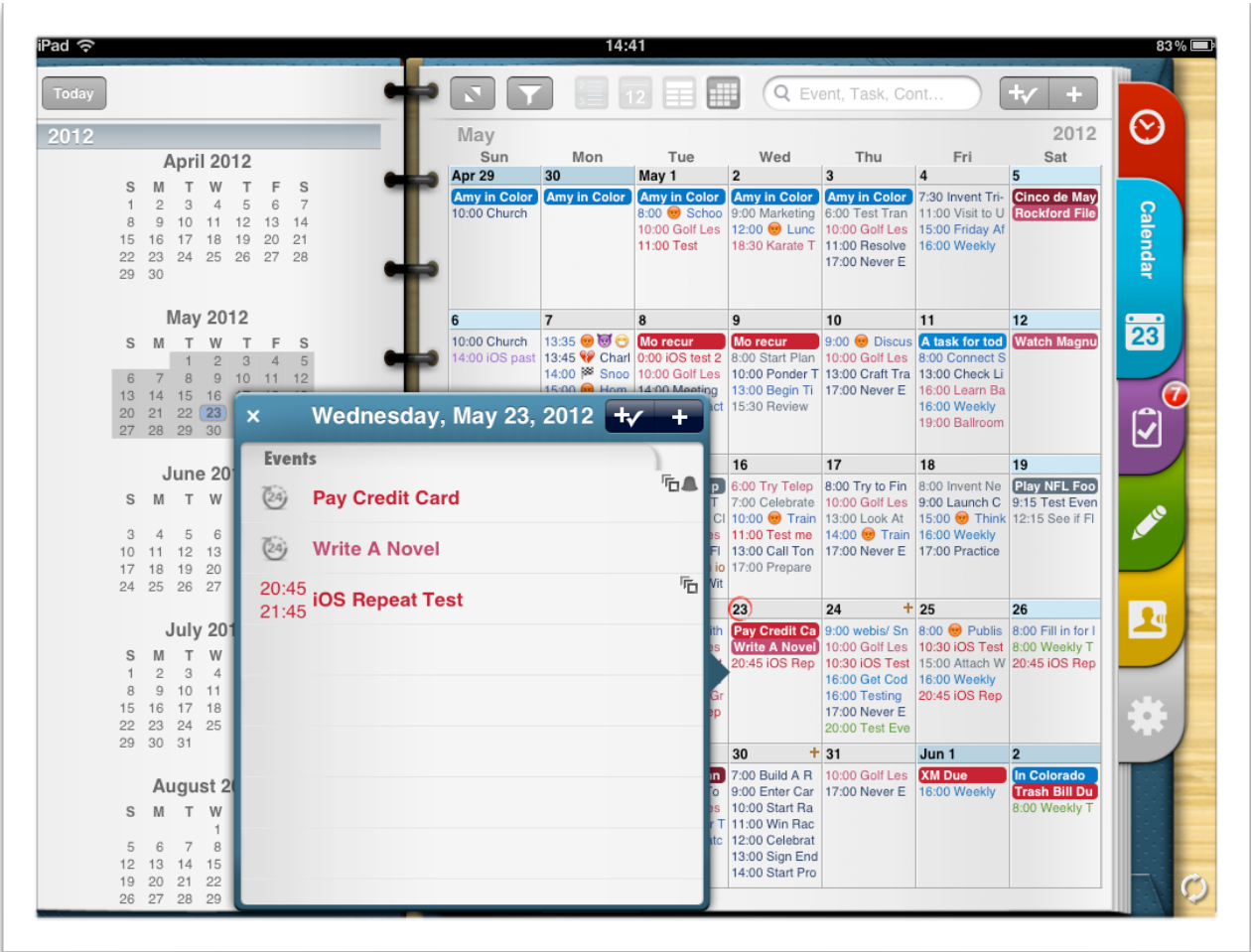


Tapping a month cell on the iPad will open a summarized view of the selected day, items in this view can be tapped to see even more detail or to be edited. It is also possible to add tasks and events from this view. Simply tap the “X” in the top left of this view to exit it (See illustration3.7).

Please note here that the iPad does have some additional features in the calendar views. Next to the calendar filter button (the funnel) is a double arrowed button, This button expands the right side view to the full screen. When in this view a tap to the far left of the view will bring up the calendar list, it will over lap the calendar view as shown and will put a shadow over the main view. To “roll” the view back simply tap anywhere else on the calendar (See illustration 3.8).

Illustration 3.8 iPad Slide Out Menu

Illustration 3.7 iPad Day Detail View



Task View

The main task view is divided into three sections. The first part of the view shows various groupings. These include among others, the inbox, folders/projects, next actions and more. Under that is the “Groups” area here you will see the predetermined groups that Pocket Informant uses for tasks. Some of the items included in this area are overdue, undated, completed today, etc. The next view area is the Smart Groups area, Smart Groups are user created and user defined filters.

When you tap on a Group or Filter you will be presented with a list of Tasks. The user interface for the Task lists provides a quick-and-easy way to work with single and multiple Tasks.

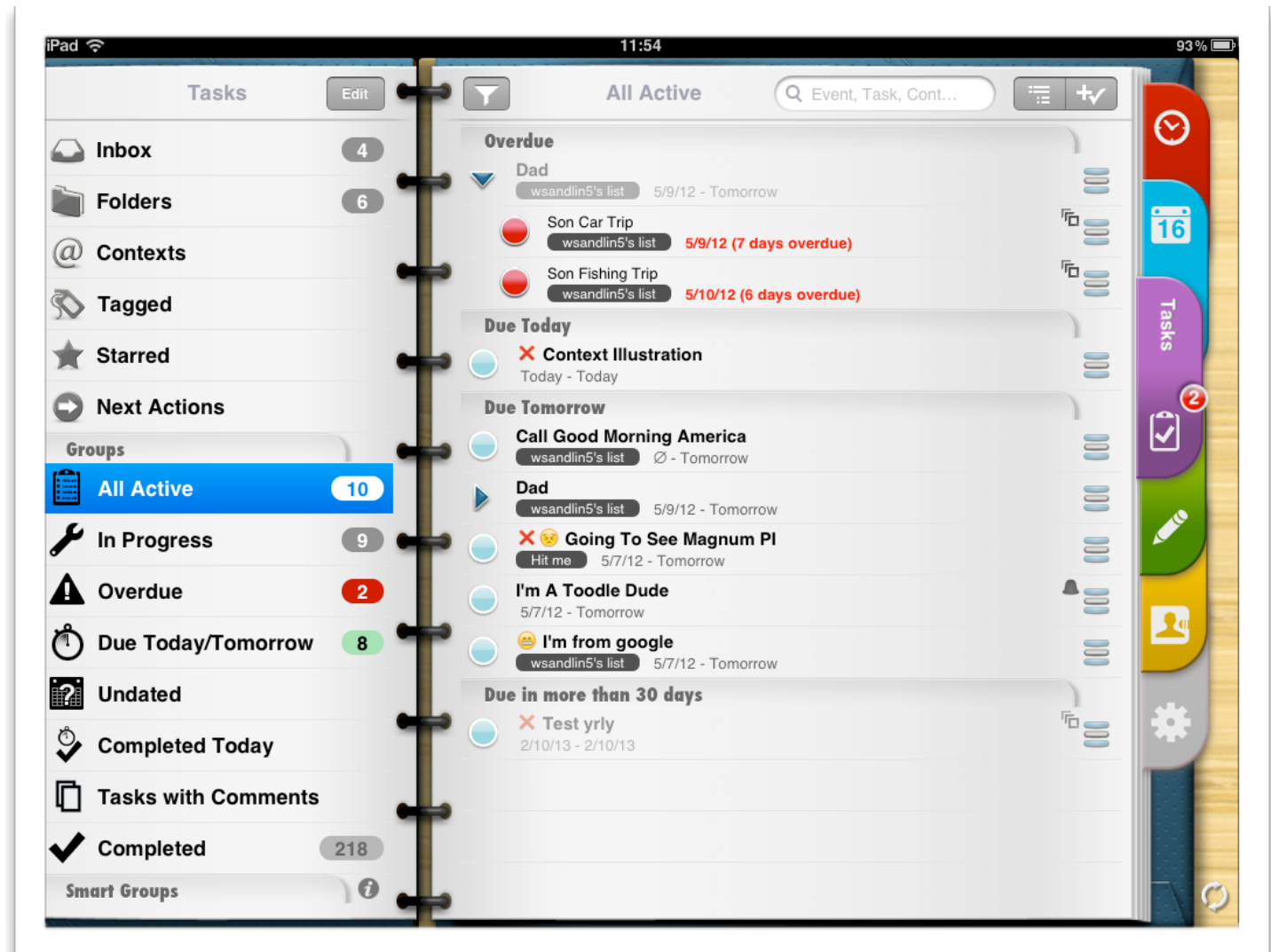
To mark a Task completed, simply tap on the circle on the left. To select multiple Tasks at once for a “mass” operation (such as complete or delete), tap the right most (3 bar) button for each task that you want to complete or delete. To view the details or to edit the Task, simply tap the task which will open the detailed view and provide access to the edit dialogue.

This View contains a **Filter** button in the top-left corner and two buttons on the right of the Navigation Bar. The first button is the groupings button, this button when active presents the groupings menu just below itself. This groupings menu slides left to right and will group the tasks in the view by the selected grouping. The next button in this view is a magnifying glass or search button, tapping this button will open a menu that will allow you to search a task or add a task. The next button is the task add button, this button allows you to add new Task items.

In the Today View tasks that are overdue will show both in the “In Progress” area and the “Due Today and Overdue” areas. Using the multi-select button on one occurrence will automatically select both.

The task view has been revised with regards to the display of parent and child tasks. The parent and child relationship is maintained throughout all of the task grouping and views except completed.

Illustration 3.9 iPad Main Task View Shown iPhone/iPod Touch Similar



Also in the view child tasks can be collapsed into the parent task to simplify the view or expanded to see all of the child tasks of the parent.

Currently the Pocket Informant task view only supports one level of child or subtasks.

Tasks with the title showing in italics are tasks that are due in the future.

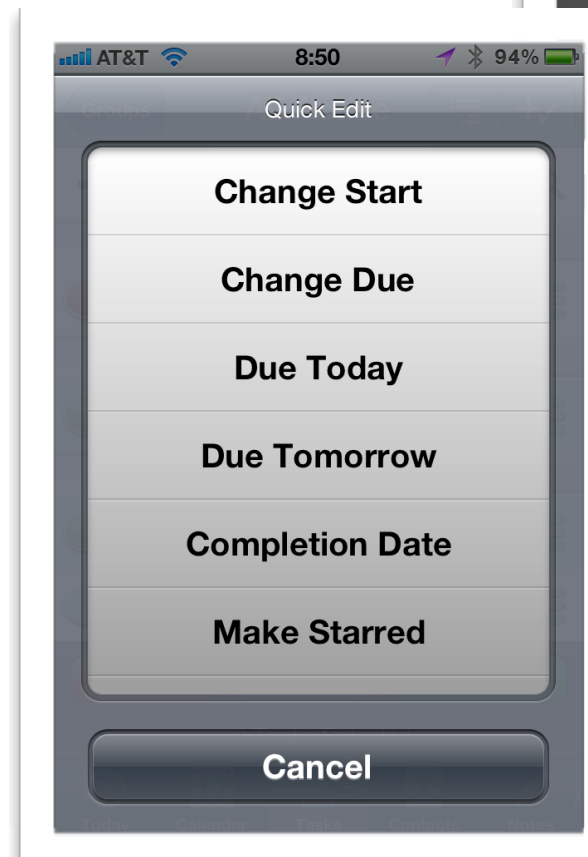
Multi-Select/Delete/Complete/Edit

You can select multiple tasks and edit their details in one step or make simple group wide edits. When selecting multiple tasks you will notice a menu coming up at the bottom of the screen which has three buttons that are detailed below.



- Delete-This one is obvious, after selecting multiple tasks, tapping this button will delete all of the selected tasks.
- Edit-Tapping this button will allow you to edit the details of all the selected tasks in one step. It is important to note here, that all edits will apply to all of the selected tasks. For example if you edit the due date, all of the selected tasks will now have the edited due date.
- Quick Edit-This will likely be the most used button when in the multi-select menu. From here you can take the multi-selected tasks and change the start date, change the due date, Due Today, Due Tomorrow, Completion Date, or Make Starred. important to note that if the selected tasks are all Starred then the Star function will change to Remove Star and will carry out that action if selected. If some of the selected tasks are starred and others are not the Star function will default to Make Starred. That is normal behavior and as stated above once all the selected items are starred the function again will change to Remove Star.

Quick Edit Menu All Devices Similar



Task Conversions

Tasks can easily be converted to events or projects by pressing the bottom right button from the task detail view screen. When converted to a project the tasks children (if there are any) will be visible within the project. Other operations from this button allow the task to be converted to an event or template, or even e-mailed. If e-mailed to another Pocket Informant user the task can be imported directly into their Pocket Informant. Other useful buttons in this task detail view include the duplicate operations which looks like a plus sign. This function will create an exact duplicate of the selected task. To the left of the duplicate button is the task completion button. Tap this button to mark the selected task completed. The left most button in the view looks like a trash can. This is the delete button and will delete the selected task.

In the task detail view the star function for a task can be toggled on or off.

Franklin Covey Task Mode

The FranklinCovey To Do mode will change Pocket Informant’s editor and View in subtle ways. First, the GTD groupings will disappear. Second, instead of using Contexts, you are given the ability to prioritize using A-Z/1-99. *Other Franklin-Covey features such as Projects with hierarchical Tasks, Daily Notes, Compass, Mission, and so on are planned for a future release.*

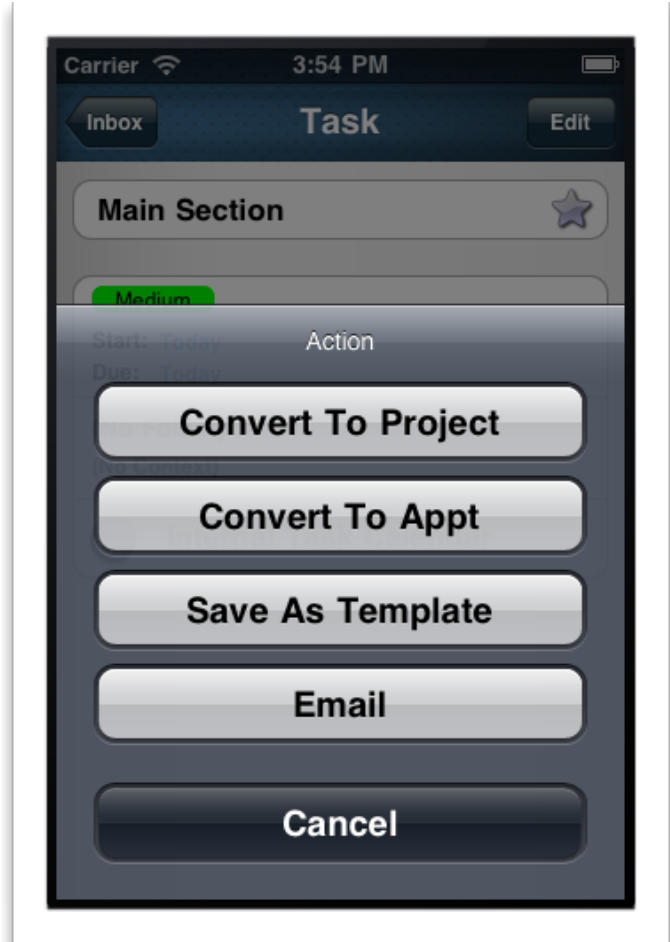
The A-Z/1-99 priorities are a powerful method of organizing your Tasks into main Tasks/sub-todo’s, or into a project’s stages. They are only limited by your methods.

The priority system can be used in conjunction with FranklinCovey methods and techniques or you can create your own. For example, some of our users allocate the first letter as a second type of category such as “G” for Groceries.

A priority of “0” (zero) is supported as a non-prioritized letter priority. For example, “A0” would mean that you have given a To Do an “A” priority, but not any sub-priority yet. The Franklin Covey priorities do not sync via any of the currently available methods.



Illustration 3.10 iPhone Conversion Screen shown all others similar



Getting Things Done (GTD) mode

GTD is defined by David Allen on his website (davidco.com) and is short for “Getting Things Done.” Below is a summary of some of the highlights of this methodology, but to more thoroughly understand the motivation behind the GTD process, see David Allen's website, or read his book titled *Getting Things Done*.

GTD is a process for To Do management that contains two key elements: control and perspective. You gain control and perspective through the workflow that contains five distinct phases:

- Collect
- Process
- Organize
- Review
- Do

Projects and Contexts

Projects are part of the Organize phase of GTD. Every regular To Do that requires more than one physical action to achieve becomes a Project. These Projects are tracked and periodically reviewed to make sure that every Project has a “Next Action” associated with it, and thus can be moved forward.

For example, you may need to fix the alternator on your car. This one To Do becomes a Project and the subsequent Tasks might be:

- Look through phone directory for a mechanic
- Call mechanic
- Ask about estimated costs to fix the alternator
- Schedule an appointment
- Bring car to mechanic
- Pick up car

The next uncompleted action in this Project becomes the Next Action. This type of list allows you to easily see what you have to do to complete a Project and organize your time more effectively. We commonly get stuck with simple tasks (“Fix Alternator”) on our list that we keep procrastinating because we have yet to accomplish the first step. This process breaks down the steps and makes it mentally easier to process and complete.

Now couple the list above with Contexts. Contexts can be thought of as a physical location (such as Grocery Store), or a mode of operation (such as "Phone Call") or even a time of day. For example “Call Mechanic” would potentially be associated with a “Phone Calls” Context. The next time you are making a phone call you can look at your “Phone Calls” Context and see that this would be the perfect time to complete all Tasks that require a phone call, thus moving multiple projects forward at once.

Standard Task mode

Formerly known as Toodledo mode this task mode is designed to better mimic the terminology and behavior of the Toodledo online task system. It behaves much like the GTD system below but with a few differences described as such:

- Projects are named Folders
You can read the GTD mode reference and simply use Folder for everything named Project instead
- Each Folder can have multiple Next Actions
- Next Actions are not automatically assigned
- During sync with Toodledo the tag is no longer used as a Calendar name
- Folders cannot have to do items manually ordered

Simple Task mode

The simple task mode is a basic to do mode of operation for the Pocket Informant tasks In this mode the task options are reduced and simplified. The differences between the other task modes and the Simple Task Mode are listed below:

- Tags, Next Actions, Subtasks, Priority, Completion Percentage, Icons, Sensitivity, Repeat and Contexts are not supported in this mode.
- Projects are supported
- The main Task View is simplified showing only the following groups, All Active, Overdue, Due Today/Tomorrow, Completed
- This task mode mirrors the task support of Pocket Informant GO!

Inbox

Pocket Informant lets you quickly create new Tasks without assigning dates, Projects, or any other information. The Inbox is where Tasks that have no associated Project are shown. You will at some point process these Tasks by either completing them or organizing them into Projects and Contexts.

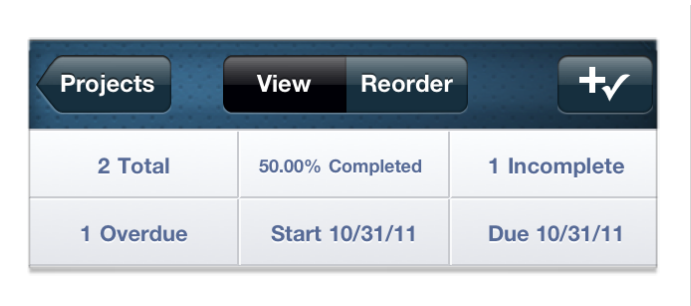
Once a Task is assigned a date, context, project, or status it is moved out of the Inbox. When using the Franklin Covey task mode the Inbox is not visible as it doesn't really fit with that task mode. The Inbox is also not visible when in the Simple Task Mode.

Project/Folder

This Task Group View will allow you to see the current Projects/Folders. Tapping on a Project will show the uncompleted Tasks in that Project. Tapping on the Edit button while in the project view lets you delete or edit projects.

Tapping on the Project while in edit mode allows you to rename a project or complete it. *You should always complete a project when you are done with it.*

Across the Navigation Bar in this detail View are four buttons. The first is titled **Project** and will take you up one level in the View. The middle two buttons are **View** and **Reorder**. View is the default and will let you view your Tasks and access the standard features of the Task cell described above. To reorder Tasks (for example, you may want to move a Task to the top to make it the Next Action), simply toggle the view/reorder control and you will see the standard reorder "thumb" control (3 bar button) appear on the right-hand side of the Task cells. *Note that View/Reorder are not available in Standard Task mode.*



The screenshot shows a navigation bar with four buttons: 'Projects', 'View', 'Reorder', and a '+✓' button. Below the navigation bar is a summary table with three columns: '2 Total', '50.00% Completed', and '1 Incomplete'. The bottom row of the table shows '1 Overdue', 'Start 10/31/11', and 'Due 10/31/11'.

Projects	View	Reorder	+✓
2 Total	50.00% Completed	1 Incomplete	
1 Overdue	Start 10/31/11	Due 10/31/11	

At the far right of the Navigation Bar is the **Add** button(+). This button allows you to add new Tasks. If you are using Landscape orientation you will see three buttons to **Group**, **Search/Quick Add**, or **Add**.

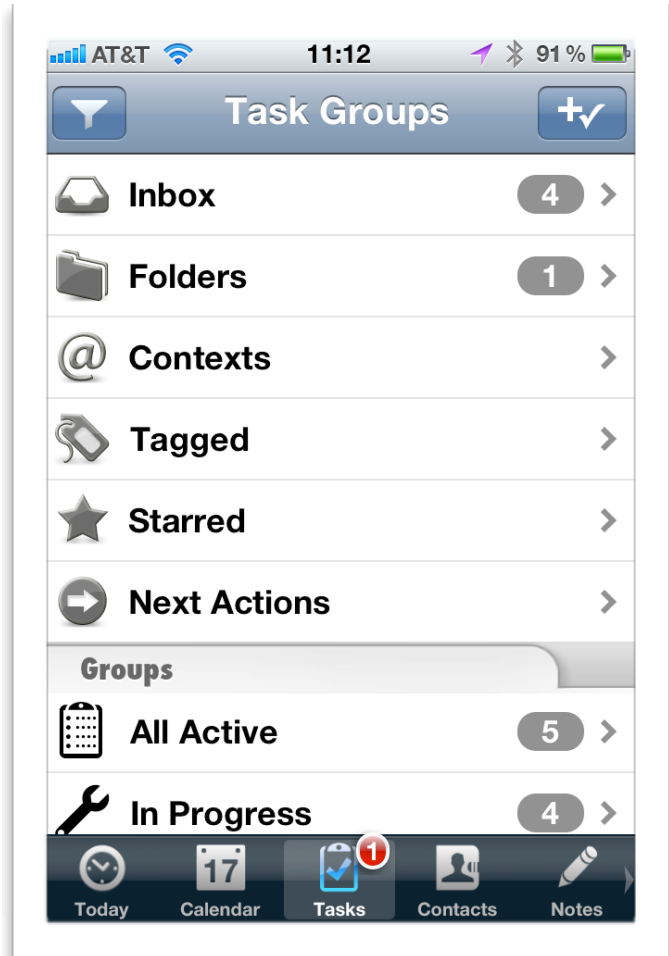
Pocket Informant has a dashboard for tasks that are assigned to a project/ folder this is a summary or properties table for the contents of the folder or project. At a glance one can see total tasks, completion percentage, start and due dates to make Pocket Informant even easier to use.

Creating Projects

Projects are created in one of two ways.

- While in Project View you can scroll up above the first Project and press the "Create Project" button.
- While creating a new Task you can create a Project in the Project list

Illustration 3.11 iPhone shown, all others similar



Contexts

The Context Group keeps Task items grouped by their Context. A Context is typically used to group by location or mode of operation, such as “Email,” “Phone Calls,” “Grocery Store,” etc. To make use of the context location alarms you can assign a physical address to a context. If an active task is assigned to that context. Pocket Informant will set off an alarm when you are in close geographical proximity to the address in the context. (Requires a device with 3G/4G/LTE connection abilities this is not supported on Wi-Fi only devices) The notification will let you know that you have an active task at the location. This group is not visible when in the Franklin Covey task mode as it, like the Inbox, doesn’t really serve a purpose in this particular task mode. Contexts are not available in the Simple Task Mode.

Creating Contexts

Contexts are created in one of two ways.

- While in Context View you can scroll up above the first Context and press the “Create Context” button.
- While creating a new Task you can create a Context in the Context list
- It is important to note that if you are going to use the context locations that you turn on the location alarms and select an address when creating the context. Addresses need to be entered in the following format to be as accurate as possible; Address>City>State>Zip. Otherwise they may not be found. If Pocket Informant doesn’t seem to find the address you are looking for try entering some variants of it.

Tagged

Tags are a way to create a unique identifier for your task. When in the Task creation mode, you can assign a tag to your task this is essentially another filter method. The defaults are “family” and “work”. Tags assign a color and can be viewed when you look at the task detail. You can quickly know what the tag is by the color, for example blue is for work so when viewing a task with a blue flag one could quickly identify that the task is work related at a glance. The tagged grouping is not available in the Simple Task Mode.

To see the Tasks for a particular Context, simply tap the Context and you will see all of the Task items in that particular Context. Again, all the standard Task controls are available in this View.

Creating Tags

Tags are created and managed in the Pocket Informant General Settings. Tap the Manage Tags option from the menu to create and manage Tags. Tags can also be added from the task editor. Just tap the tag field and type in the name of a new tag and tap the green plus sign. This will create the tag and immediately apply it to the task you are creating.

Starred

The Starred Group keeps Task items that have been starred. You can use starred tasks as a hotlist, favorite tasks, or a quick list, a priority list or any other reason that works for you. The Starred grouping is not available when using the Simple Task Mode.

Next Actions

This Task Group View will allow you to see the Next Actions for each Project. A Next Action is the first Task that is uncompleted in a Project. You can also assign a Next Action to a Task that is not assigned to a Project if you wish, and it will show up here. Next Actions are not available when using the Simple Task Mode.

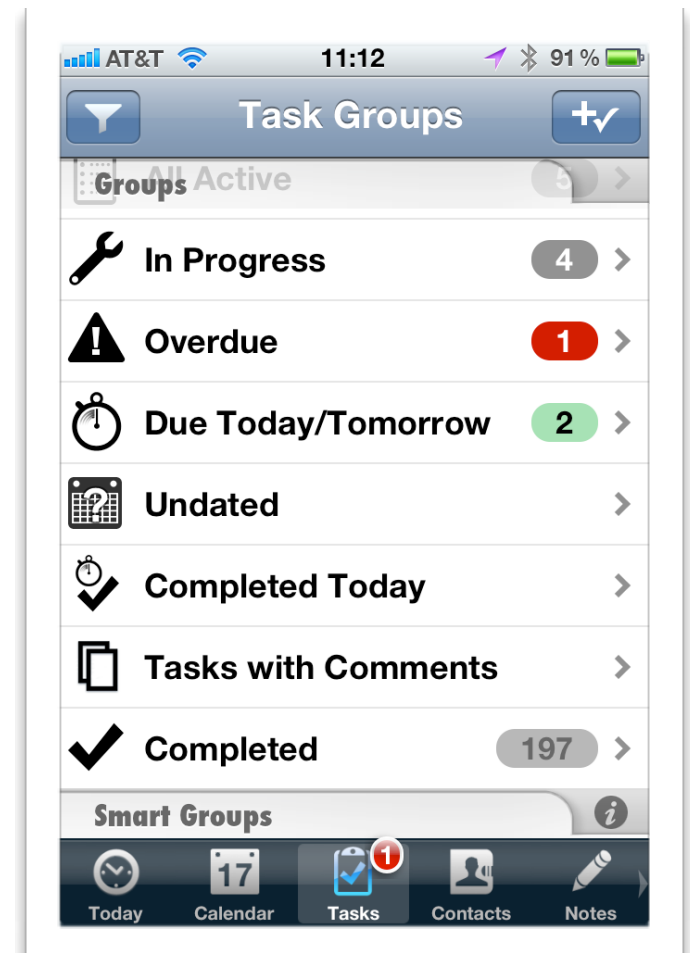
Groups

The lower middle area of the Task screen is the Group area. There are several pre-defined groups. The various groups are listed below with their detailed descriptions. The detailed group views are very similar in operation. At the far left of each group name is a bubble with a number in it if there are any Tasks in that Filter. The number indicates how many Tasks are in that Filter.

Tapping any of the Filters will show you the following, as well as the specific Filter detail:

- All Active** This View shows all Tasks that have not been marked Completed.
- In Progress** This View shows all Tasks that are currently in progress (meaning that it's past the start date of that Task and it has not been marked Completed). Not available in the Simple Task Mode.
- Overdue** This View shows all Tasks that are currently overdue (i.e., the current date is past the due date of that Task and it has not been marked Completed).
- Due Today/Tomorrow** This View shows all Tasks that are due today or tomorrow. This filter will also show Overdue Tasks.
- Undated** This View shows all Tasks that have been never been assigned a date. Not available in the Simple Task Mode
- Completed Today** This filter shows all of the tasks completed today. Not available in the Simple Task Mode
- Tasks With Comments** Any tasks that have had comments added will show in this group. Not available in the Simple Task Mode.
- Completed** This View shows all Tasks that have been marked Completed.

Illustration 3.12 iPhone Task Groups view all others similar



Smart Groups

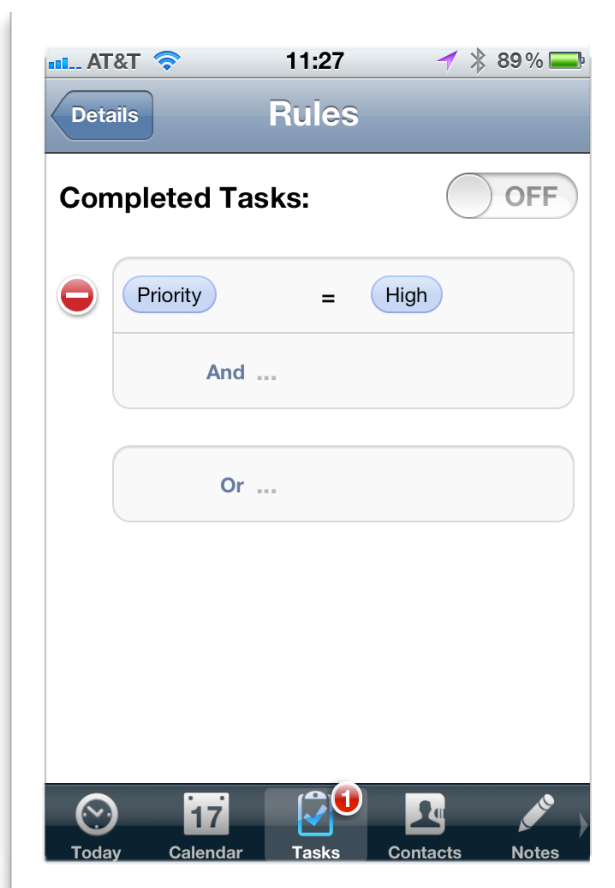
Smart Groups can be summarized as user designed and designated filters. There are two ways to create a Smart Group. From the main Task View scroll down to the bottom of the view into the Smart Group area and tap the “information button”. This will open the Smart Group management screen. Tapping the + button will allow you to name, define and save your new Smart Group.

The other way to access the Smart Group creation and management screen is to go to Settings and Task Settings, then tap the Manage Smart Groups cell. This will take you into the same manage/edit screen as mentioned above.

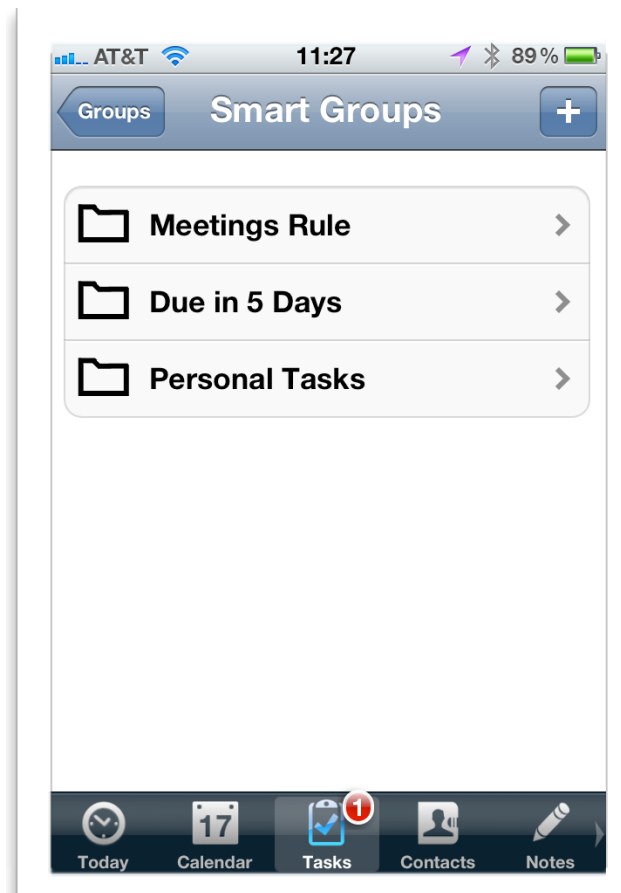
The Smart Group characteristics can be set to almost any task property or combination of task properties that you can think of. Multiple rules can be set for a group and tasks can be filtered to the most finite collection. Once the Smart Group is created the tasks that meet the criteria will automatically show up there.

Note that in the screen shots below there is a slider labeled “Completed Tasks”. When this slider is set to on the created rule will also include completed tasks. These tasks will then be visible when viewing the Smart Group. Smart Groups are not available in the Simple Task Mode.

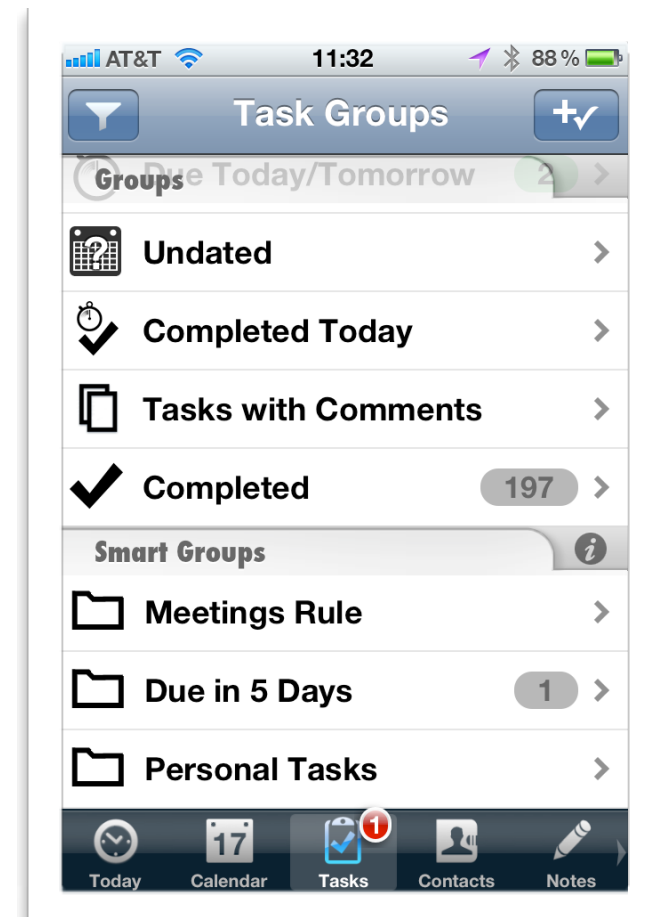
Setting up the rule



Managing the rule(s)



Seeing the rules in use



Task Creation Elements (Summary)

When you create a Task, you have many options within the Task screen. Only the title is a required field. In the Advanced Settings of Pocket Informant you can configure the task editor to your liking by turning off, in the editor, the fields that you don't use. This is general information Simple Task Mode does not support all task editor options.

Start/Due Time

A start or due time can be set on tasks with a due date. These tasks will be marked as overdue after the specific due time.

Dates

Pocket Informant allows you to set optional start or due dates for a Task.

Repeat/Recurring/Regenerating

Recurrences do not show up in the editor until you have added a due date to the Task. The recurrence rule you set can be applied to the "completion date" of a Task, or to the "assigned due date." For example, if you set a Task to recur weekly on the completion date, when you mark the Task as Completed, the next Task will be due a week from the date you mark it Completed. Alternatively, if it's set to recur from the assigned due date, the new Task will be due a week from when the last Task was due (regardless of when you actually completed it).

Task Alarms

Pocket Informant allows you to set an alarm for a Task. There are two types of alarms for a task you may choose. It is important to note that you can have multiple alarms on a task but each individual alarm has to be either set for Days Before or On Date. The Days Before will allow you to set an alarm for a specific time on a specific number of days preceding the task. The alarm option for On Date will allow you to set an alarm for the task on a specific date at a specific time

Projects and Context

By selecting the Context or Project View, you can select or create Contexts and Projects for this Task. To create a Context or Project simply type in the name you wish to use and then select the "Create" line. (Note: the Context field is not shown in FranklinCovey mode.)

Illustration 3.13 iPad Task Editor shown all devices similar



Parent Task

A task can be a sub-task to other tasks. This lets you choose the parent of the existing task.

Action

Pocket Informant supports several action types that you can use for managing your Tasks. Pocket Informant attaches special importance to Next Actions, which, in a Project, cause a Task to move to the top of the ordered list, if selected. If a Task is the current Next Action and you change it to any other action type, then it is moved to the bottom of the ordered list. The action types are self explanatory and are listed below:

Next Action

Active

Planning

Delegated

Waiting

Hold

Postponed

Someday

Cancelled

Reference

Priority

This field when enabled allows you to assign a priority to your task. The priorities are as follows: None, Top, High, Medium, Low.

Completion Percentage

This is a slider that can be set to various whole point percentages reflecting the completion percentage of the task.

Sync To

This setting is where you determine where the task will sync to. If you only have one sync source available that is compatible with tasks the choices will be that sync service or none. If you do not have a task compatible sync service set up or if you are not syncing your data at all the default choice will be “none”.

Tags

Tags are delineators that can be assigned to a task, you can assign as many as you would like to the task. Tags are helpful when using filters, or Smart Groups, and they aid in grouping tasks for quick identification.

Icon

These are visual identifiers that you can apply to your tasks that facilitate at a glance identification of your tasks.

Child Task

This is another name for a subtask, child tasks can be created from within the editor or a task can be made a “child” by assigning a parent task to it.

Sensitivity

This setting is where you as the user determine how sensitive the task is, these do not effect visibility but are for your reference. The Options are Normal, Personal, Private, and Confidential

Comments

This is a text field on the task where you can put task comments (notes) on your task. These comments in no way interact with the separate Notes function in Pocket Informant and vice versa.

Sub/Child-Tasks (Overview)

Pocket Informant supports a powerful set of sub-task features; sub-tasks are not supported in the Simple Task Mode. Subtasks are denoted by being indented under the parent task in the Tasks View with the following limitations:

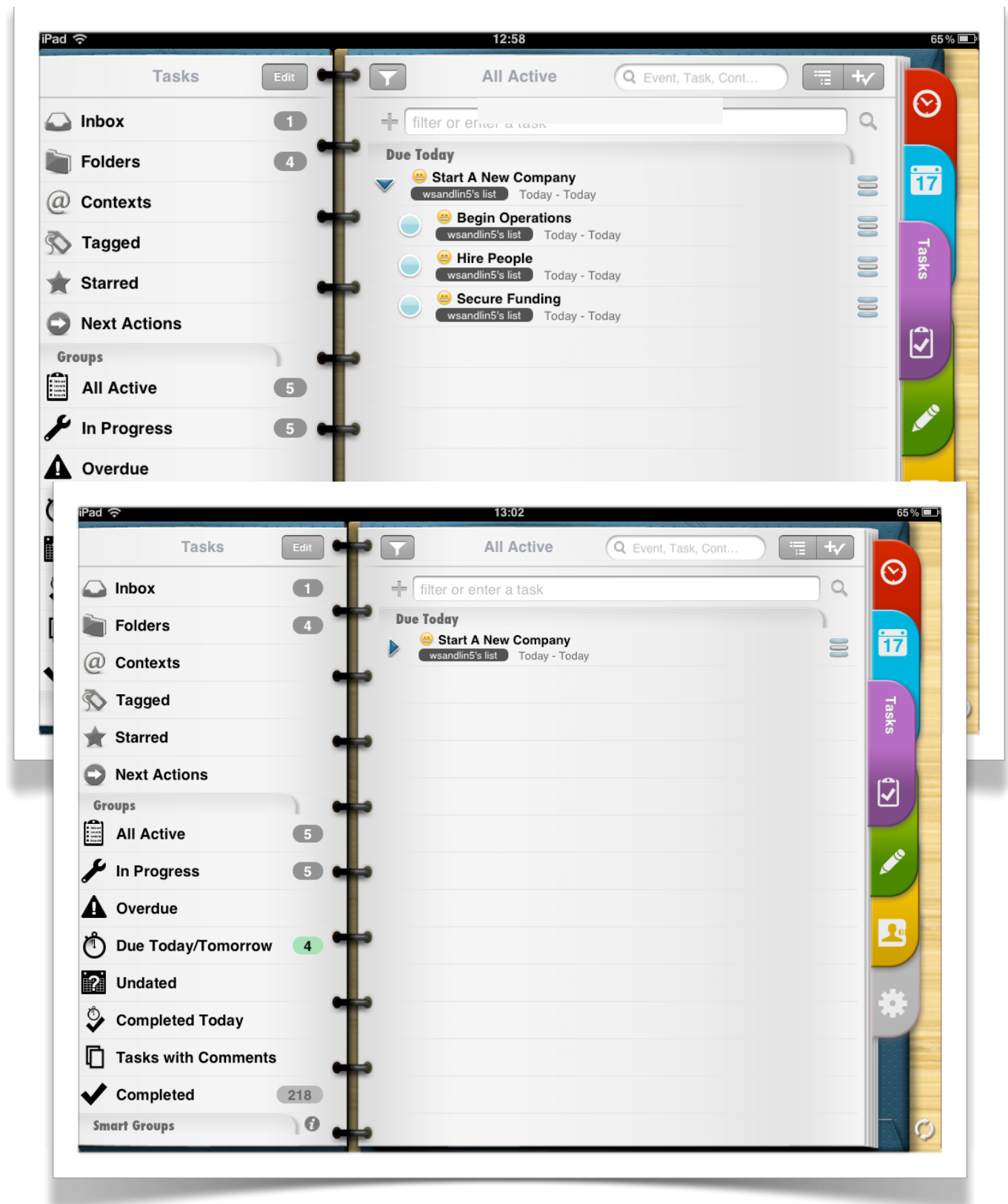
- **Must be in the Tasks View, Today View, or Calendar List View.** Subtasks are not shown indented in *the* Calendar Month View, Week View or Days View at this time.
- To maintain the relationship the parent task will stay with the child task through various groupings even if the group the child is in doesn't match the parent. (this can be customized in the Advanced settings)
- Indentation does not occur in *GTD Project view* (but does in *Franklin Covey Project view*) because *Project View* is user-sorted and as such the user can move the tasks in any order which would conflict with the sub-task display.
- Pocket Informant only supports one level of subtasks.

Sub-tasks will sync with Toodledo Pro, Pocket Informant Online and Google Tasks, but not, iCal, Outlook or non-Pro Toodledo accounts.

Child/Subtasks can be collapsed or expanded under the parent task. The control for this is the arrow at the far right of the parent task. An arrow pointing down indicates that the child tasks are being displayed. An arrow pointing right indicates that the view is collapsed and the child tasks are “rolled up” and out of view.

The children will follow the parent task if the folder/project is changed.

Illustration 3.14 Subtasks shown on iPad all other devices similar



Contacts View

The new Contacts View integrates the iOS contacts database into Pocket Informant. Contacts can be viewed, edited, deleted, and added. It is also possible to email or call contacts from within this view. Please note that calling from this view will not return you to Pocket Informant when the call is completed. This is not developmentally possible at this time.

To call a contact tap the contact then tap their phone number.

To edit a contact tap that contact then tap the edit button.

To email a contact, create a task from a contact or create an event from a contact swipe across that contact, this will open a submenu with buttons for each of those functions. Also you will see a trashcan button on this menu. Pressing that button will delete the contact completely.

To add a contact simply tap the plus button in the top right of the view.

To view Contacts with pictures as shown in the screenshot on the right please do the following;

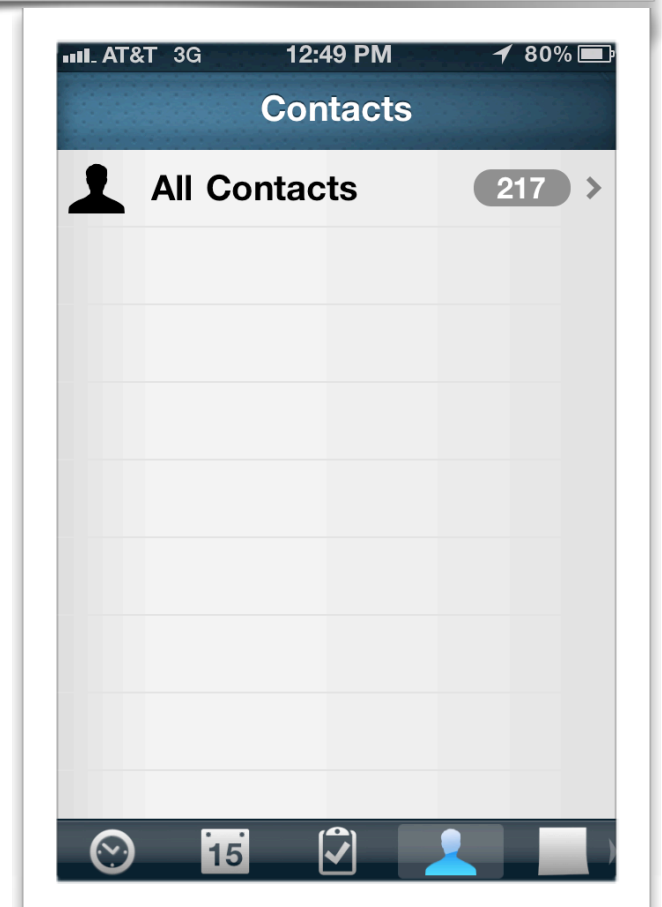
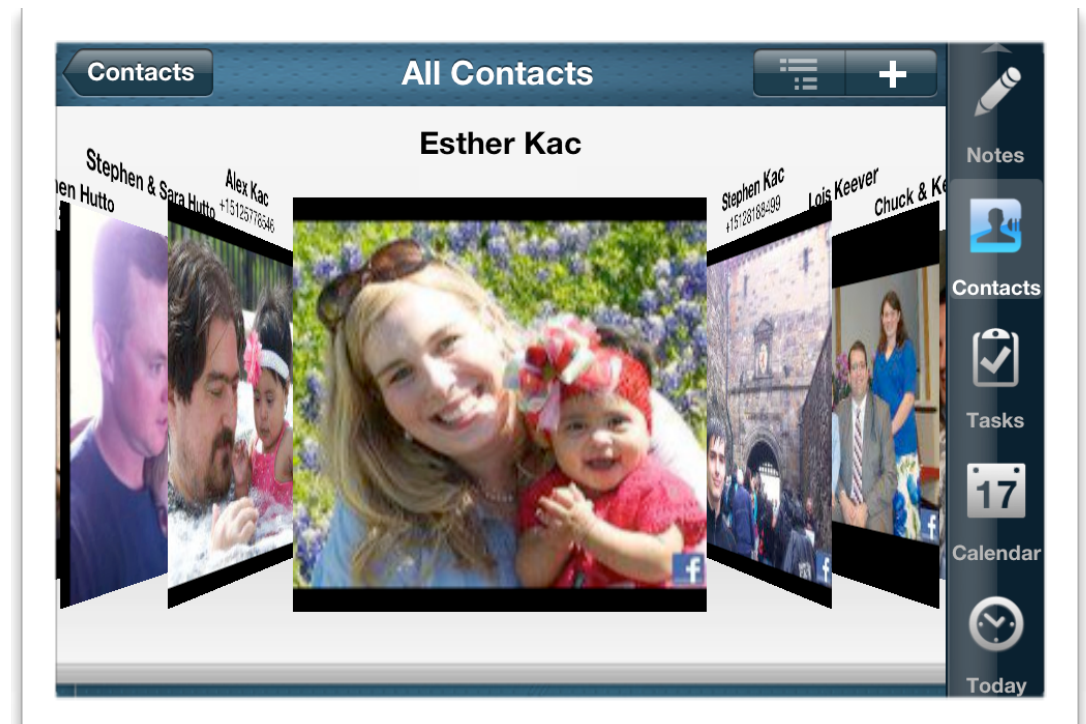
On the iPhone or iPod Touch simply rotate the device to the landscape position and the view will automatically changes to the photos.

On the iPad you can view contacts in the photo mode in either orientation. To switch views tap the grouping button at the top right next to the add button. Then tap the "Pictures" option. The contacts will then be viewed by those that have photos.

For both the iPad and iPhone/iPod Touch when viewing the contacts by photo only the contacts with photo's will be visible. Any contacts without photos will not be visible. To view the entire contacts list you will need to go back to the contacts list view.

The method of photo display can be changed by going to the Pocket Informant settings, appearance and scrolling to the contacts appearance settings and selecting the Carousel Mode. The display options are Flat, Cylinder, Flow and Flip. We encourage you to try all of the settings before settling on one.

The Grouping button allows you to group contacts by their company name. This button is next to the add button and pressing it will open a drop down that allows the grouping to occur or you can cancel the grouping by selecting the "None" option.



Notes View

In the notes view you can create notes by typing them in or you can record voice notes. Notes can be sorted by tags or folders for easy sorting. You can add tags or folders as needed.

To create a text note press the + button in the top right of the view. To set items such as tags and folders scroll up to bring those fields into view. When your note is complete press the done button to save it.

To create a voice note, tap the microphone button in the top right of the view. Then record your note. (It is best to have your mouth near the microphone of your device, on the iPhone/iPod Touch you can hold the device as if your were making a phone call.) When finished press the save button to stop recording and to save. The note will be saved with the title set as the date and time it was recorded. The play button on the left side of the note name will playback the note. The button on the right side when tapped will display the voice note information. Here you can change the name of the note and add a text note if needed.

Tapping the envelope in the top right of the view will allow you to directly email the voice note directly from Pocket Informant.

The notes are then filtered, **please note that All Notes and Today's Notes only refer to your voice notes and text notes created in the Notes View. The Notes View is a standalone feature and should not be confused with the comments on events and tasks.**

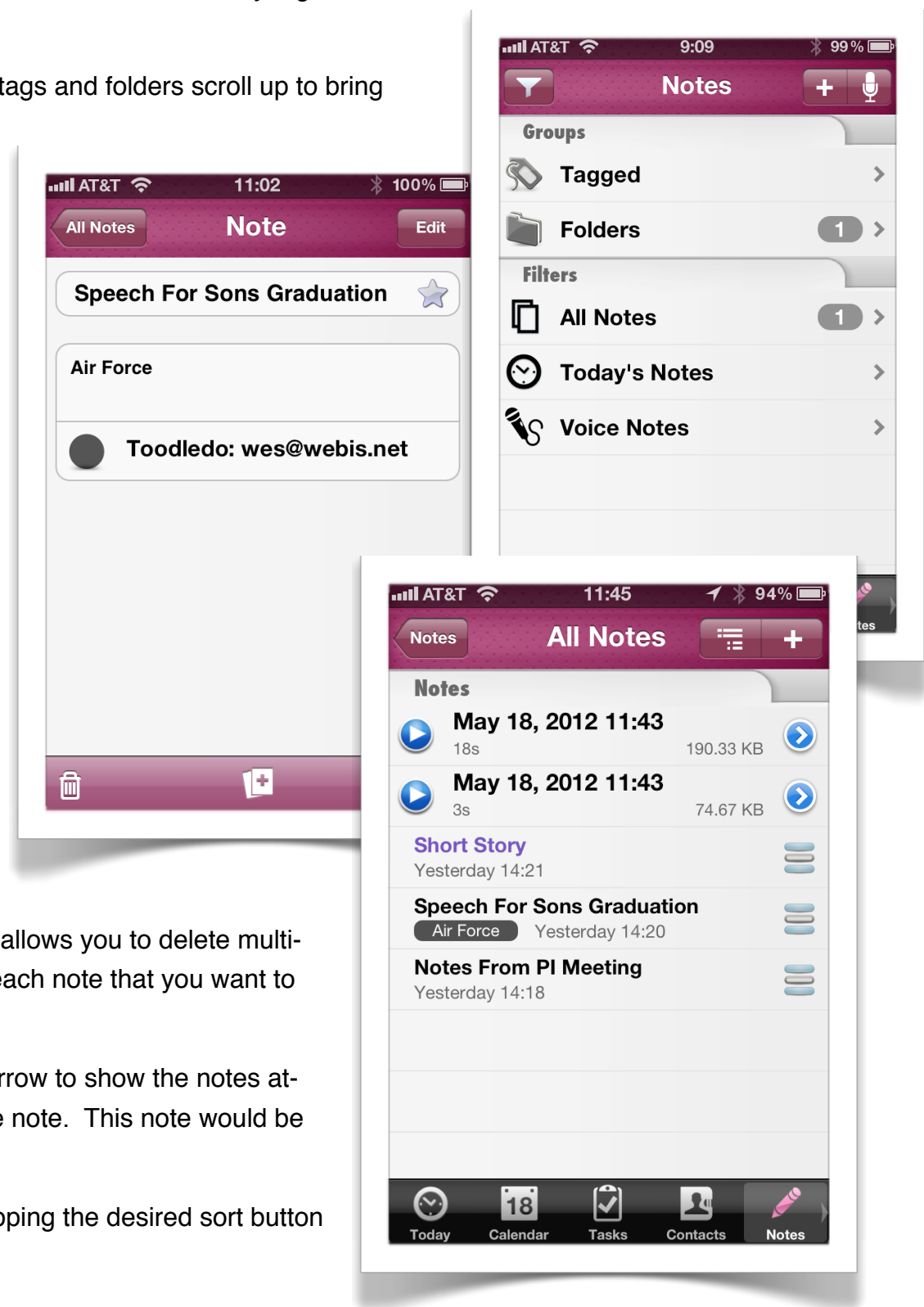
Tapping one of the filters will allow you to see the notes contained in that filter. Tap a text note to view its details then tap the Edit button to begin editing the note. When done editing tap the Done button to save the changes.

The (3 bar) button on the far right of the text notes is called the Multi-Select button and it allows you to delete multiple text notes at the same time. To select multiple text notes, tap the far right button for each note that you want to delete then press the appropriate action button to complete.

Voice Notes can have some of their attributes edited. Tap the right side blue and white arrow to show the notes attributes. The title can be edited from this view. Also a text note can be added to the voice note. This note would be used in a similar fashion to writing info about a recording on a CD.

Notes can be grouped by dates, titles, tags, or folders/projects in the various views by tapping the desired sort button at the top of the view, the sort button is to the left of the add button and has lines on it.

Illustration 3.15 iPhone Notes View shown, all others similar



Filtering is also available by tapping the filter button in the top left of the main notes view. The filtering can be set to filter the notes by their calendar view or their tags. Voice Notes cannot be filtered at this time.

All of the views in the Notes area have grouping options available to make it easy to find specific notes.

Text notes can be synced with Toodledo, Pocket Informant Online or Outlook via WDS sync. To sync notes with Toodledo simply go to the sync settings in Pocket Informant, select the Toodledo sync then tap the sync options. Move the notes slider to the On position and your notes will begin syncing with next sync operation once that is done.

To sync text notes with WDS, please right click on the WDS icon in the system tray of your PC, then click in the Sync Options menu. There you will see a checkbox for syncing notes. Simply put a check in the box to begin syncing notes. They will sync during the next sync operation.

Voice notes will sync with Pocket Informant Online but cannot be accessed at this time via the web interface, they can only be synced.

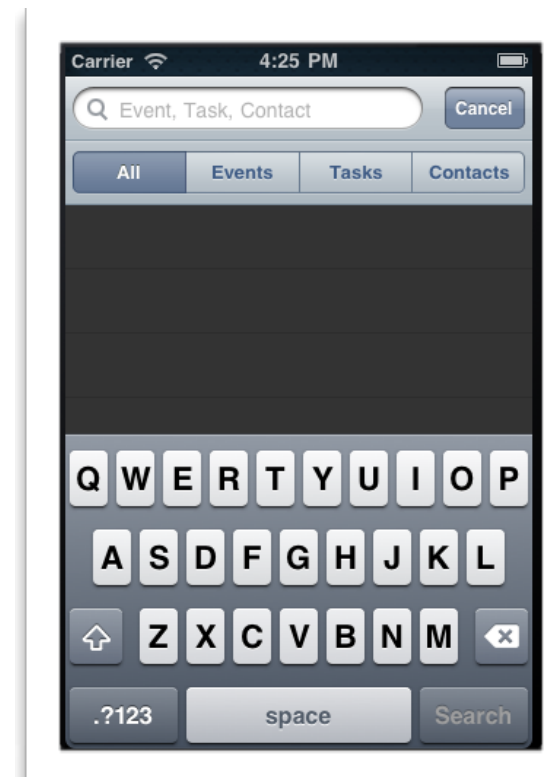
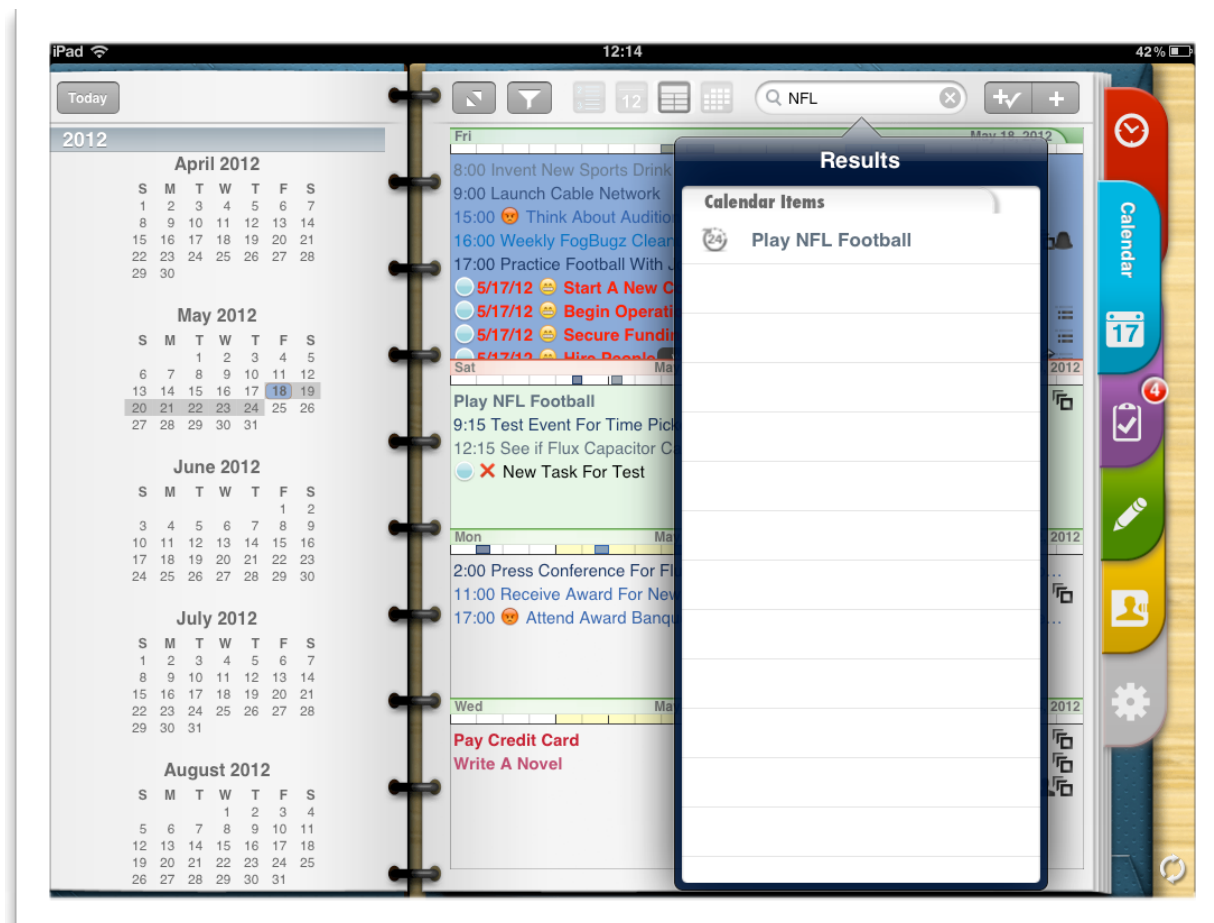
Search

On the iPhone and iPod Touch the Search function is a separate view it can be accessed by swiping the tab bar at the bottom and tapping the search button. The search view can help you find items such as Contacts, Tasks, and Events by simply typing in a characteristic or element such as a first name or an Event name. All items that match the search criteria will be displayed below the search bar in various sections. As with any other list view, all controls are available in the search view to mark Tasks as complete, edit Event details, etc. The Search View has been enhanced with it's own "mini filter" so to speak. Now when searching for something, simply tap the search window to bring up a selection of filter buttons. Enter your search criteria then select the filter button of your choice which will narrow down the scope of your results. The four buttons are "All", "Events", "Tasks", and "Contacts". At this time the Search View does not include Notes.

On the iPad the search operates a little differently as there is no dedicated Search View. Each view has a search field in the header area of the page. iPad search results will be grouped automatically by task, contact note, etc. The actual searching of items is identical to that of the iPhone version in that you enter a criteria to search by, Pocket Informant will then search the Tasks, Events and Contacts for the information that you entered.

Also like the iPhone/iPod Touch version Notes are not included in the search

Illustration 3.16 iPhone and iPad Search screens shown



Templates and Filters

In this chapter we will detail how to use templates and filters. The 2.5 release of Pocket Informant brings with it a major revision to the filter interface.



Templates

Templates are a way to create preset events or tasks that you can apply to event or tasks while editing. You can create templates by tapping on the action button of a task and selecting “make template”. Or any event from the detail screen by pressing the template button or by visiting the Settings->General->Manage Templates screen. The iPhone/iPod Touch and iPad template buttons are shown.



Event Templates

Event templates are like a pre-filled in form for events . You can set the time, calendar, alarms and several other event attributes in the template; when you apply that template those pre selected attributes will be used in the event.

All Day Events are treated specially by letting you choose a duration of the all day event which is then applied when you choose that template.

Photo's and contacts can be attached to a template.

Task Templates

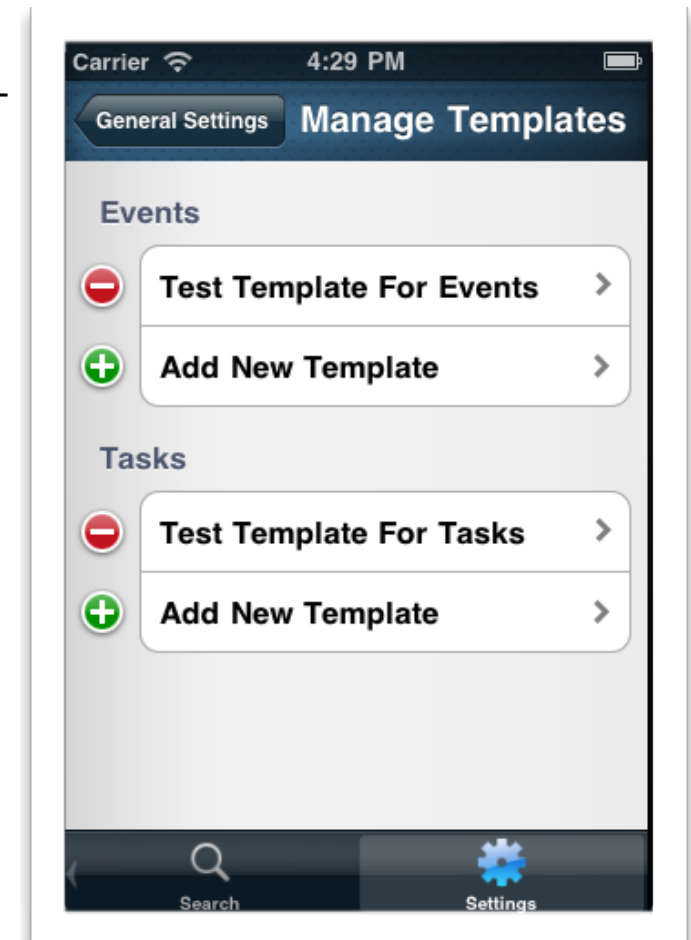
Task templates are likewise like regular tasks except that you don't set the dates of the templates. Instead you are given a choice of how far out the due date is automatically set past the current date, which is then applied when you pick that template.



Applying Templates

In the event or task editor you will see a button to the right of the title field the button looks like an iPhone with a star on it, which when tapped on brings up the template picker. Select the template and it will be applied.

Child tasks can be added from within the template or an existing task can be selected to be a child. When creating new child tasks in the template those child tasks will be created as tasks each time the template is used.



Calendar/Tag Filtering

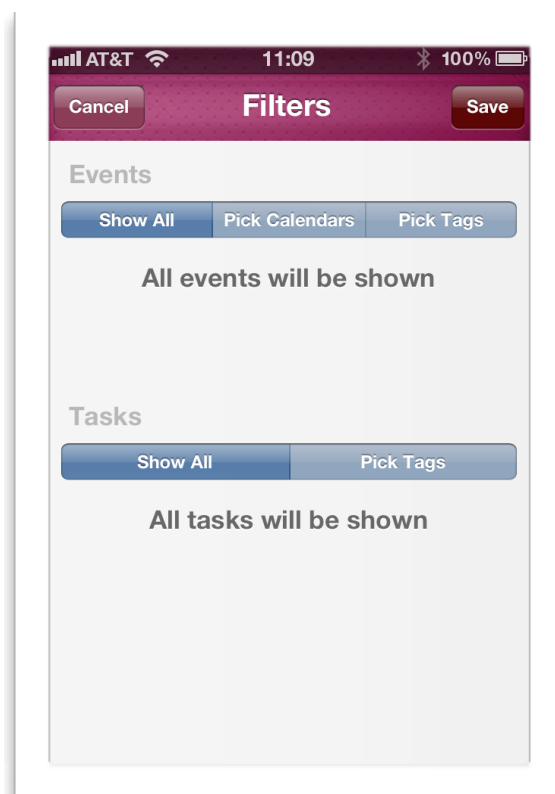
The Views in Pocket Informant have the ability to be individually filtered. What this means is that you can customize the view to show only the information you want to see. Events can be filtered by calendars and/or tags. Tasks and Notes can be filtered by tags but not by calendars.

When filtering you have two ways to set the active filter:

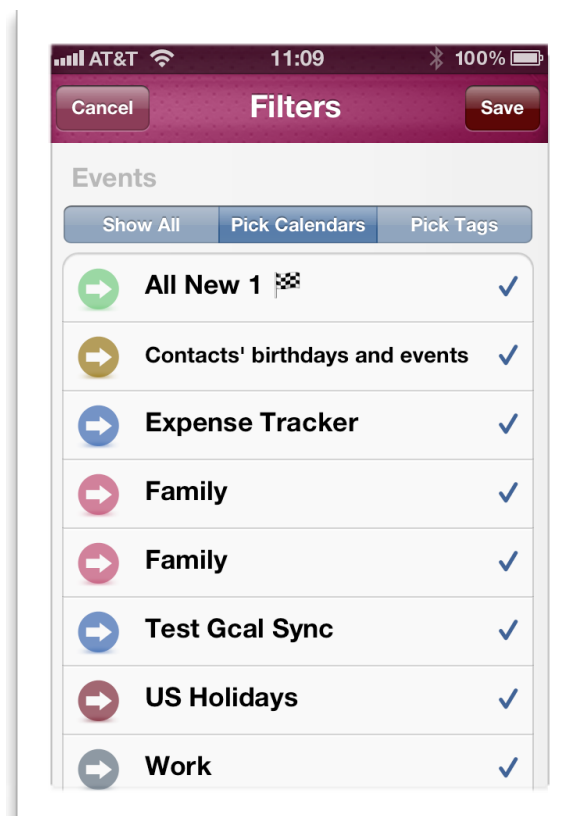
- Tap each calendar or tag you wish to display (a check mark indicates that calendar will be displayed) and then tap Save.
- Press the colored Calendar or tag circle on the left side of the calendar cell - this will select just this single calendar/tag to filter by and immediately perform the filter.

If you would like to view all of your Events Notes and Tasks (meaning the filter should not apply), Then simply tap the show all button for the events and/or the tasks. The screenshots shown are for the iPhone/iPod Touch, the iPad is similar. Also, please note that the screenshots below are shown for tasks and events, the notes filter is similar.

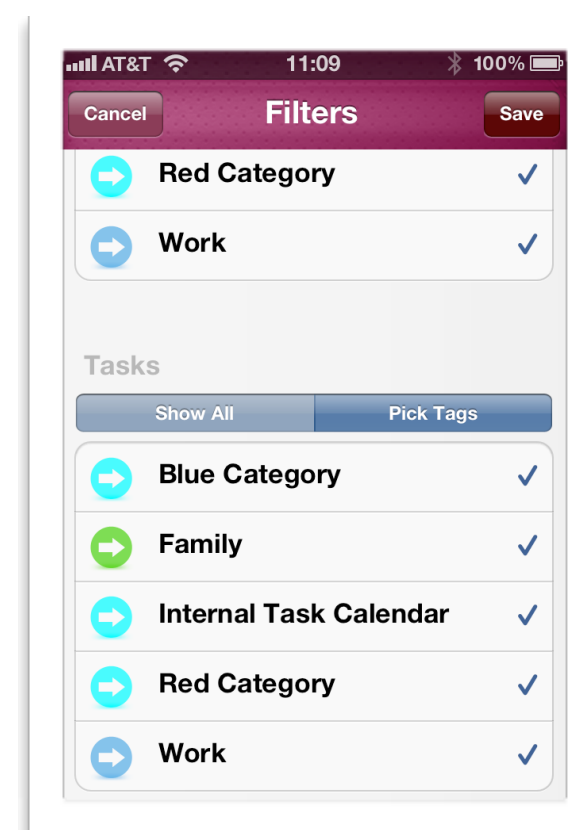
Main Filter view



Calendar Filter Selection



Tag Filter Selection



Alarms

In this section we will explain how the alarms work in Pocket Informant.



Alarms

Alarms can be visual notifications or they can have a sound associated to them that you configure in the settings. Tasks and events can have their own sounds meaning one alarm sound can be set for your tasks while a different sound can be set for events. Alarms allow you to easily distinguish which alarm may be sounding. The default sounds for each is set in the settings area for tasks and calendars respectively. When an alarm goes off the visual notification will allow you view the item attached to the alarm or to ignore the alarm.

Alarm Settings

The firing of alarms is controlled by the iOS. The alarms scheduled in Pocket Informant are given to the iOS to notify at the appropriate time. To make sure this works properly you will need to prepare your device. The first step is to go to the iOS device settings, notifications, and scroll down to Informant. Tap the Informant icon there and then make sure that all of the sliders are set to the on position.

Then go into the Pocket Informant settings, advanced settings, allow alarm notifications for, and make sure both sliders are set to the on position.

The final step is to go to Pocket Informant settings, then advanced settings, then database management, and tap the reset alarms button. This will refresh all of the alarms that Pocket Informant has set to fire.

Alarm Limitations

Alarms are a great feature however alarms are limited by the iOS to 64 alarms per application. Pocket Informant still must schedule each alarm going forward. For this to happen Pocket Informant has to run every so often to create these alarms. This will usually happen naturally, but you may still find a need to launch Pocket Informant at least once every few days to ensure these alarms get created. Because of the 64 alarm limit if you have multiple alarms per event and task alarms, you may find that Pocket Informant has only created 2-3 days worth of alarms. Opening Pocket Informant up at least once a day will ensure that the alarms continue to get regenerated. This is not a hard and fast rule as if you use fewer alarms you can go farther between opening Pocket Informant.

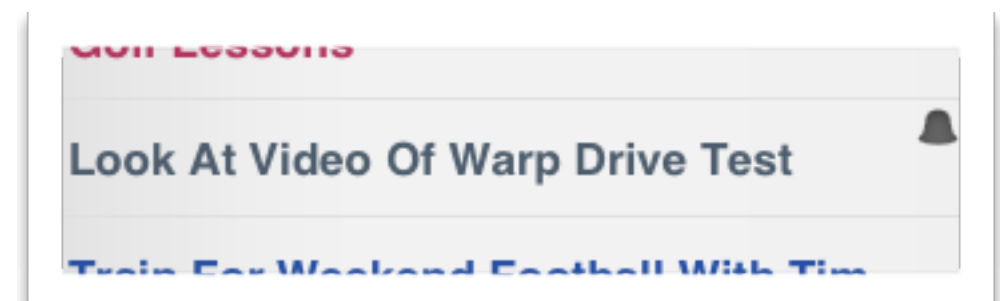
Snoozing All Alarms

This is not yet available, but will be in a future release.

Alarms from Synced data

Pocket Informant will create Alarms for data synchronized down immediately after the sync is complete. To confirm that the alarm has been created, look for the alarm "bell" icon next to the event.

Illustration 5.1 Alarm symbol on a calendar event



Synchronization

In this chapter we will discuss and explain all currently available sync options.



Synchronization (Overview)

Syncing is a way that Pocket Informant can share data with various data sources both inbound and outbound. Pocket Informant comes ready to sync with Google Calendar, Google Tasks, Toodledo, Outlook on the PC, and Pocket Informant Online.

During synchronization operations Pocket Informant has a sync indicator that will show on the screen while the sync operation is in progress (iPad version shown).

Text notes can be synced with Toodledo, Pocket Informant Online or with Outlook via WDS syncing. In the Toodledo sync configuration the slider for notes support simply needs to be moved to the “on” position. In WDS the notes sync to Outlook is automatic when the checkbox in the WDS sync option for notes is checked. Pocket Informant Online supports the syncing of Voice Notes.

Events created on iOS calendars cannot sync via any of the currently supported Pocket Informant sync services.

It is possible to sync multiple devices running Pocket Informant to the same sync source but some precaution does need to be taken when doing this. We will explain more about that later in this section.

Creating a sync

To create a sync please do the following: go to the settings, and select Sync Settings, then tap the Add Sync Service button. Next you will need to select the service that you want to sync with. For all services except Desktop Syncing you will need to enter your login credentials (user name and password) for that service, then select the calendars you want to sync to that service. Once that is done press the First Time Sync button and the initial sync will begin.

The graphic shows a list of the currently available Pocket Informant Sync Methods it shows how the sync takes place and what are the main items that are synced with each method.

Reset Sync

Occasionally, due to the variables in all sync processes it may be necessary to do a “Reset Sync”. Regardless of the

Illustration 6.1 iPad

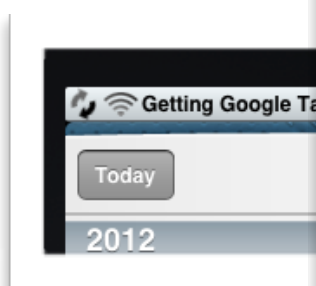
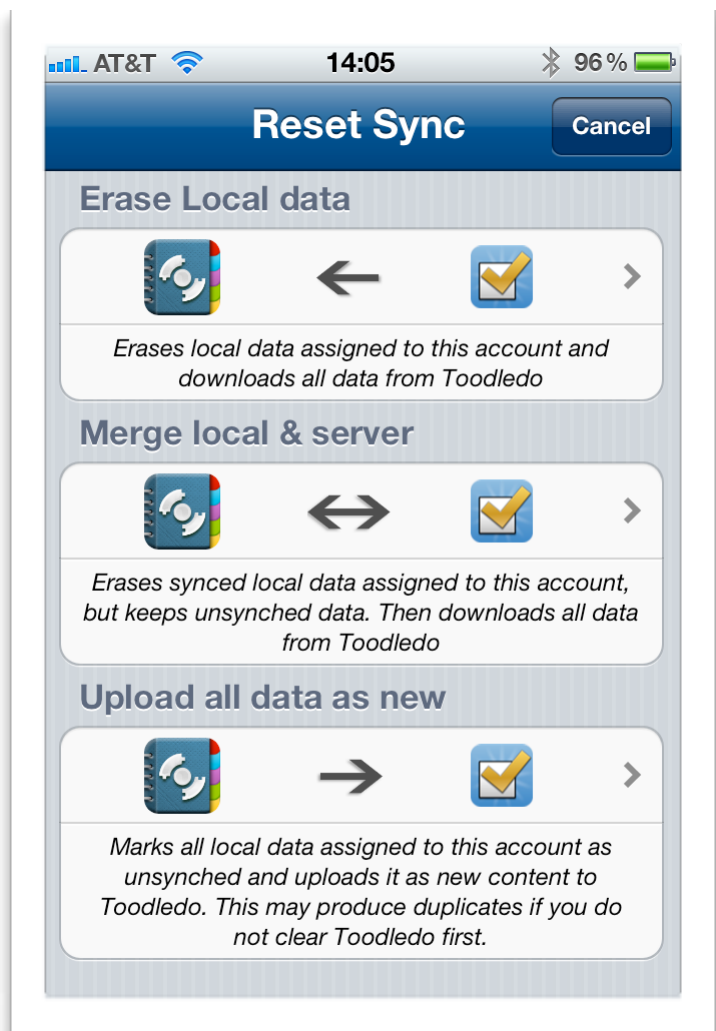


Illustration 6.2 Sync services currently available in Pocket Informant

Sync Method	Sync Via	Events	Tasks	Text Notes
Google Calendar	Cell/WiFi	Yes	No	No
Google Tasks	Cell/WiFi	No	Yes	No
Toodledo	Cell/WiFi	No	Yes	Yes
Desktop Sync (WDS) PC Only	WiFi Only*	Yes	Yes	Yes
Pocket Informant Online	Cell/WiFi	Yes	Yes	Yes

* Must be on same network as PC

Reset sync options



sync method the reset options are the same and are outlined below.

Erase Local Data-This will erase all of the local data in PI that is assigned to the sync account. It will download all of the information from the sync source. Using this method ensures that the data coming into Pocket Informant will mirror that from the sync source. Any data in Pocket Informant that was not synced prior to this operation will be lost. Using this method it is highly unlikely that your data would be duplicated.

Merge Local and Server-This option will erase synced data in Pocket Informant that is assigned to this sync account. It will keep the un-synced data. It will then download all of the data from the sync source.

Upload All Data as New-This option takes all of the data in Pocket Informant and marks it as un-synced. It then uploads all of it to the sync partner. It is imperative to make sure that your sync partner is “clean” meaning that all of the data is out of it otherwise duplicated data could be the result.

Miscellaneous Information On Syncing (Important)

When a new event sync is created if you do not specify the calendars to sync this new sync will assume that you want to sync all “uncommitted” calendars so they will by default, all be assigned to the new sync service. A new sync service cannot remove calendars already assigned to an existing sync service.

Every event sync account expects to have at least one calendar. If a new sync account cannot find any free Calendars to take ownership of, then it will create one

When creating new folders/projects you will be required to specify which sync services the folders/projects will sync with.

When creating new contexts you will be required to specify which sync services the contexts will sync with. It is a best practice to always sync folders and contexts syncing to the same sync account. If a context does have a different sync account than the task it is attached to does the context will be removed from the task during sync.

Items created in these folder/project are automatically assigned to the same sync account as the as the folder/project

If only one sync service is in use it is automatically the default for all supported items.

A calendar can only sync to one sync source. So for example if I have a calendar called Grocery Shopping that I build my grocery shopping schedule in and I want it to sync to my Google Calendar and my Pocket Informant Online calendar this is not possible I would have to decide to sync it to one or the other. The same applies to Contexts and to Folders/Projects.

Tasks and notes cannot be assigned to a specific calendar to sync to, instead they are assigned to specific services to permit them to sync.

Multiple Device Syncing

Pocket Informant supports the syncing of multiple devices to the same sync source. However when doing this there are some basic guidelines that should be adhered to so that you can ensure smooth and accurate syncing. The first thing is to make sure that auto-sync is turned on so that a sync will occur each time that Pocket Informant is opened. This will provide Pocket Informant with the latest data from the sync source and will help to avoid a condition where older data can potentially overwrite new data. Its also important to avoid doing things like editing events/tasks or completing tasks on Device A, not syncing then making the same edits on Device B then syncing both devices. Doing this can cause corruption. Its always best to make sure that your devices are syncing automatically. If you are in a situation where you are unable to sync simply make sure that you keep your edits on one device until you are able to sync again, after the device with the edits completes a successful sync you can resume normal operations.

Desktop Outlook (Windows Only)

Pocket Informant can sync with Outlook for Windows using our free WDS client or **gSyncIt** from Fieldston Software. While gSyncIt is not a free tool it is far easier to use and setup. Our free WDS client is available for download but does incur a potentially more difficult setup procedure due talking directly between your device and your PC which may be interfered with by firewall and anti-spam utilities.

When you select the Desktop Sync, you will need to make sure that you have the latest version of iTunes installed then download and install the WDS sync client on your PC it can be downloaded

<http://download.pocketinformant.com/PIIP/WDS/> Please make sure to download and install the correct version for the version of Outlook that you are using, either 32bit or 64bit. Next you will need to pair your PC to Pocket Informant. The simplest way to do this is to use the automatic settings.

When you choose automatic the name of your PC should be displayed you can tap it, you will then be prompted to enter a password. This password can be anything you desire as this is the master password for the pairing. Once paired you can select the calendars to sync then press the First Time Sync button.

If you do not have iTunes installed you will need to use the manual configuration method. To do this select the manual option you will then need to enter the IP address of the PC you are wanting to pair to. Set the port option to 1500; then enter the password to anything that you would like, set the calendars to sync and press the First Time Sync button. Please note that at this time the WDS sync only supports IPv4 addresses.

On your PC during the initial sync you will be prompted for a password, please enter the password that you just entered into Pocket Informant for the pairing.

Using the WDS sync client you can configure the WDS several different ways to sync only the data that you need.

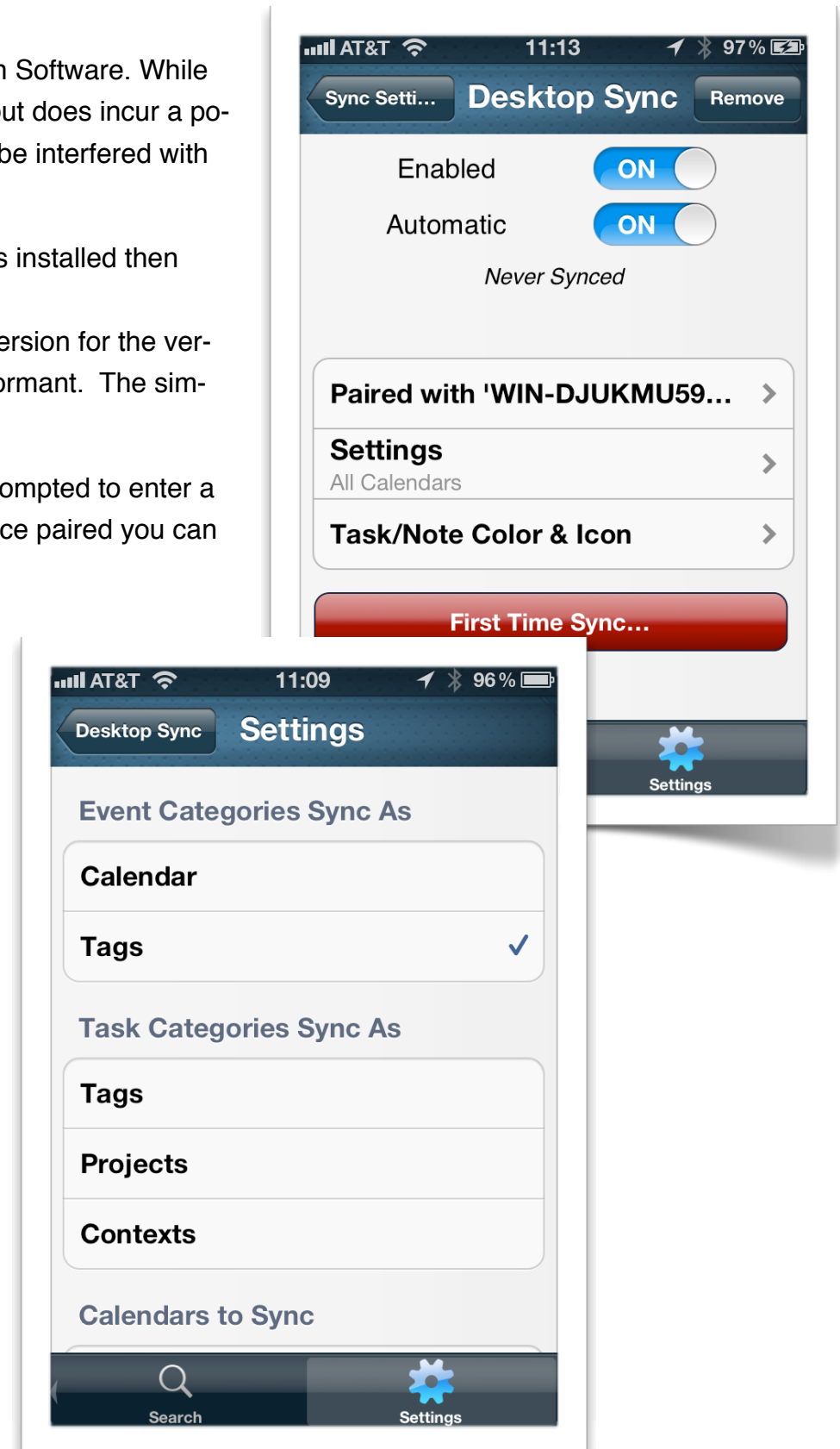
Right clicking on the WDS client in Windows open up the sync options menu. Here you can decide if tasks or events or even if both sync. You can also set the sync time frame for one month, three months, a year, or all. The notes toggle will sync notes if checked.

In Pocket Informant there are several additional settings that will allow you to tweak your WDS configuration they are as follows;

Event Categories Sync As-

Calendar or Tags

In the “Event Categories Sync As” setting you determine how the Outlook event categories will sync to



Pocket Informant you can set them to sync over as tags or as calendars.

Task Categories Sync As-

Tags, Projects or Contexts

In the “Task Categories Sync As” setting you can set how the Outlook task categories will sync to Pocket Informant. You can set them to sync as tags, projects or contexts.

Following these settings are the calendar selections to sync.

The last settings in this view is the Advanced Connection method. This setting is usually left on the default which is Desktop Connects to Pocket Informant. Occasionally when troubleshooting our tech support will have you change the method, for some users this can resolve connection issues.

iOS calendar events cannot sync with WDS.

IMPORTANT - Whenever you do an iTunes update you must shut down the WDS sync client prior to updating. Failure to do this will prevent your WDS from working after the iTunes update.

In the event that this happens to you please contact support. They will be able to assist you in correcting this issue.

When upgrading the WDS client it is best to uninstall the existing client. This gives the new client a “clean” starting point.

Due to all of the variables inherent to everyones personal and business Wi-Fi networks you may have to try different settings to find a WDS configuration that works well for you. Be patient and please contact our technical support if you get stuck. Once this is properly configured unless something changes in the network configuration you should not have to worry about it again and it should work reliably for you.

As of this writing, the sync option of syncing Outlook to iCloud and iCloud to the iOS calendar on your device is not a direct replacement for the WDS sync. There are several reasons for this. First is that the native calendar support that Pocket Informant has doesn't support tasks, this is a developmental limitation that we are working to overcome. Second is that the use of WDS allows users to take advantage of more of the robust features that Pocket Informant offers for both events, notes and task syncing.

Google Calendar/Google Tasks

Google Calendar and Google Tasks sync in a similar fashion. First you will need to have an existing account with these services if you want to sync with them. To get Pocket Informant to sync with either of these services please follow the instructions at the top of this section for setting up specific sync services. In the Google Calendar/Task sync there is an option to “Save Meta Data In Notes Field”, this feature, when enabled, will move Pocket Informant supported items such as tags to the notes field of the event in Google as those types of features are not directly supported in Google. When this feature is enabled Pocket Informant is looking for this data in the data it is syncing in. So if you have to do a reset sync or a first time sync, as long as your data has the metadata with this enabled Pocket Informant will be looking for that data and will sync it in to the appropriate slots. If you edit the event or task with metadata and assign it to a different calendar the metadata will not sync to the new calendar selection it will only sync to the original calendar that the item was assigned to.

Certain recurrence patterns can cause a slight differential between Pocket Informant and Google calendar. Outlined below is how this instance works;

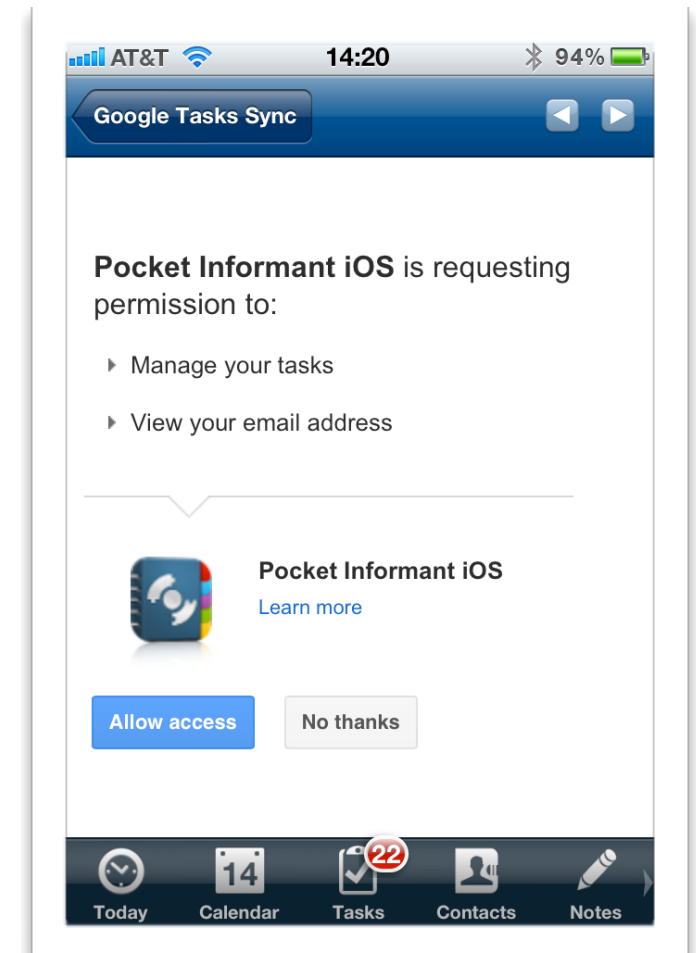
Say you create a recurring event starting on Jan 16, 2012. Set the event to repeat the fourth Sunday of every month. In Google you'll see two instances of the event - one on the 16th where the event pattern starts starts, then one on the 23rd (the 4th Sunday). Pocket Informant will only show the one on the 16th, then it skips to the next month (4th Sunday) because it assumes it already did the event for the current month.

In nutshell if you build a recurrence pattern where the first occurrence of the pattern takes place before the actual pattern starts like the example stated above, Pocket Informant will only show one occurrence for the pattern in a given time frame (as in one month for example given). Whereas Google will show the starting occurrence and the first rotation of that occurrence pattern even if it is within the same time frame.

Sync is a continually evolving and improving process, we will be posting more information and announcements on our website <http://pocketinformant.com>.

New in Pocket Informant is that we now support the ability to sync events and tasks via multiple Google Calendar/Task accounts. Following the setup instructions above you will be able to go back to “Add Account” portion of the sync settings and repeatedly add different Google Calendars.

The Google Calendar sync does not support the syncing of iOS calendar events.



Migrating Existing Calendar Data to Google Calendar

If you are using iCloud

There are a few options for migrating, copying, or syncing data from iCloud to Google Calendar. The best way is to use third-party commercial software such as [SpanningSync](#) or [BusySync](#) to publish your iCal calendars as Google Calendars. There is also a free option called [Calgoo](#) that is recommended by some, but has not been tested by WebIS.

Make sure that your iOS Devices and Mac use iCloud to sync your calendar data and set up Pocket Informant to sync with Google Calendar, and you will be set.

If you are using Outlook on Windows

1. Download [Google Sync for Windows](#)
2. Set up Sync so that it syncs up to Google
3. Set up your Sync settings in Google Calendar's settings

For over-the-air Google Exchange Sync

1. Set up your iOS Device to sync with your Google Calendar using [Google Sync for iPhone](#)

For USB iTunes Sync

1. You're done! iTunes will sync your Outlook data to the built-in iPhone calendar and the Google Outlook Sync will sync your Outlook data to Google Calendar.

If you are using iCal on the Mac without iCloud

There are multiple ways to get your calendar data to Google Calendar:

1. Purchase third-party software such as [SpanningSync](#) or [BusySync](#).
 - This is the easiest solution; however, it is an extra cost. You could use the trial versions of these packages task the initial import/export.
2. There is a free option called [Calgoo](#) that is recommended by some, but has not been tested by WebIS.
3. Free method:
 - Export your iCal calendars one by one to your desktop.
 - Go into Google Calendar and create each calendar.
 - Import the data from your iCal Exports.
 - Use the [Google Collaborator](#) application to have iCal directly sync to your Google Calendars via CalDAV.

ToDoDo

This sync method is very popular among Pocket Informant users. ToDoDo is a task and notes sync service. The instructions for setting up the ToDoDo sync are listed earlier in this section. The ToDoDo service is free, however an upgrade to the paid or “Pro” version will give you subtask support and better alarm management.

Be sure if you want to sync alarms to please move the alarms slider to the on position in the sync settings for ToDoDo, by default this will be turned off and alarms will not sync. On ToDoDo Pro accounts alarms will sync the alarm times. On the free ToDoDo account all alarms will fire at 12:00pm regardless of how they are set in Pocket Informant since specific alarm times are not supported.

When using GTD or Franklin Covey mode, Pocket Informant maps ToDoDo fields in the following manner:

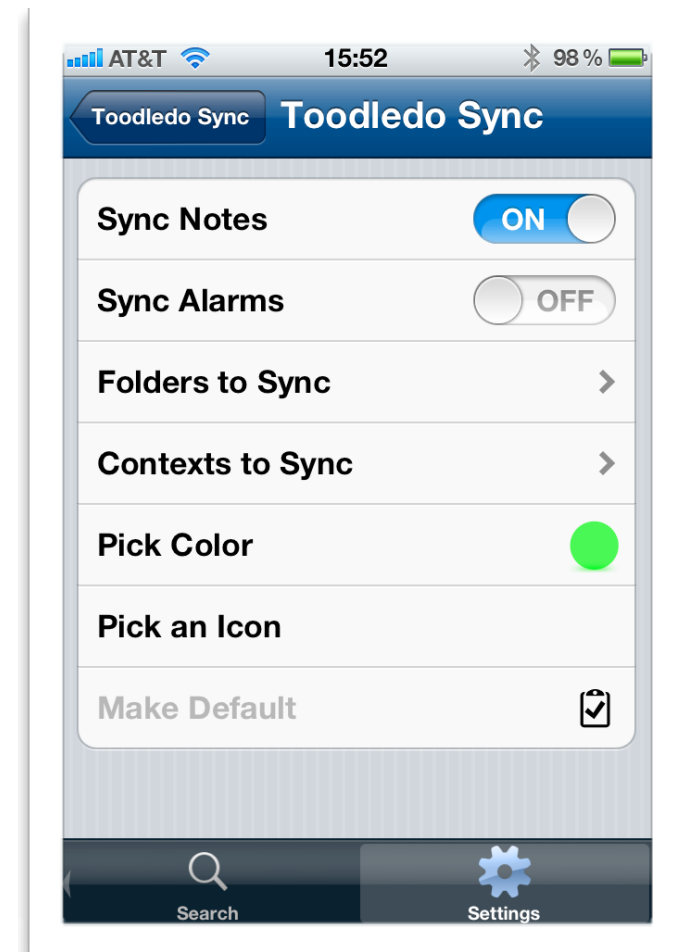
- ToDoDo Folders are mapped to Pocket Informant Projects.

For notes syncing with ToDoDo you will need to enable the notes to sync by sliding the Notes Sync slider to the on position in the sync settings for ToDoDo.

To sync alarms simply move the sync alarms slider to the on position. Alarms are not on by default and have to be turned on because ToDoDo alarms are very specific, when a sync occurs Pocket Informant alarms get changed to ToDoDo alarms, however that's only if you use a ToDoDo Pro account. If you use ToDoDo free, all alarms are at noon. So that's why we don't sync alarms by default.

The color choice will determine the color that the titles appear on the tasks in Pocket Informant, this provides the ability to differentiate tasks easily at a glance.

Pocket Informant now permits syncing with more than one ToDoDo account at the same time.



Pocket Informant Online

This is our brand new sync service. Think of this as Pocket Informant's own cloud so to speak. It is currently in its 1.0 iteration and will grow rapidly from where it is today. This is a subscription based service, the terms and subscription information are available at <http://pocketinformant.com/pio>

The directions to set up Pocket Informant to sync with Pocket Informant Online are listed at the top of the Synchronization section.

In its first iteration this sync will sync Events, Tasks, Notes (text and voice), and Settings. The advantage is that this is the only sync service that matches Pocket Informant tasks, notes and events feature for feature.

This service also has a web interface that is very similar to what you would see when you look at Pocket Informant on the device.

As with the other sync services Pocket Informant Online does not support the syncing of iOS Calendar events.

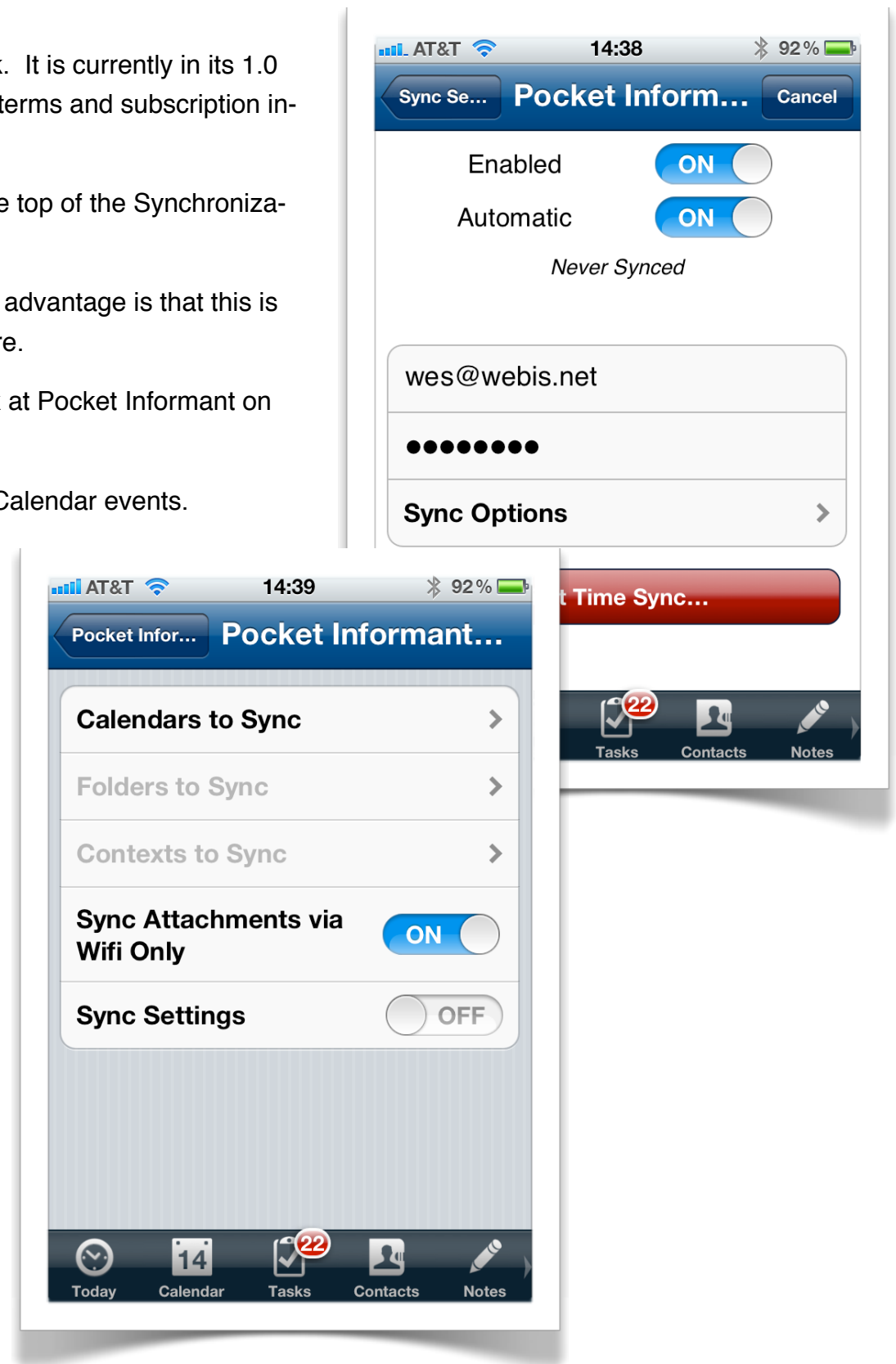
It is important to note that Pocket Informant Online does support Notes and Voice Notes syncing. Smart Groups, and tags sync to Pocket Informant Online as well.

In the settings of Pocket Informant Online you can set the calendars (events only) folders and contexts to sync and you can set Pocket Informant to only sync attachments when on Wi-Fi to limit the amount of mobile data used.

Another important feature that Pocket Informant Online Syncing has is the ability to migrate data. In a nutshell, let's say that you are syncing your task data to Toodledo but want to move it all to Pocket Informant Online.

To do that you will need to have already set up a Pocket Informant Sync account, you can do this from our website www.pocketinformant.com. Once that is done go into the Pocket Informant sync settings and build a new sync partnership with your Pocket Informant Online account. (make sure before doing the first time sync that you have selected the calendars that you want to sync from the available list, if the calendars that you want to sync are not available we can cover that in the migration) Now go ahead and do the first time sync. Once that completes you should see a menu option for migration appear.

If you tap that you will be presented with other sync accounts that you are using. Tapping one, in our example tapping Toodledo, will cause all of the data syncing with Toodledo to move to Pocket Informant Online and then remove the Toodledo sync. It is the same process when migrating data from Google Calendar, Google Task, and WDS.



Migrating Existing Synced Data to Pocket Informant Online

Make sure that you have a Pocket Informant Online account set up

Please go to www.webis.net and make sure that you have account, if you have already done this please skip this step.

In Pocket Informant please set up the sync service

Go to the settings, sync settings, tap the add button and select the Pocket Informant Online sync. if you have done this please skip this step.

Prepare to migrate the data

It is important to **only do this step to one of your devices** if you are a multi device user. Go to the Pocket Informant Settings, Sync Settings, select the Pocket Informant Online sync, and tap the migrate button. This will bring up a list of all non Pocket Informant Online sync services that you are using. From the list simply select the items that you want to migrate. Pocket Informant will then migrate the data to Pocket Informant Online and remove the sync service leaving only the Pocket Informant Online sync with any of the sync service that you chose not to migrate.

For the other devices, simply go to their sync settings and remove all existing syncs. Then add a sync for Pocket Informant Online. Next do a first time sync. The data will be reconciled, now the devices should all be in sync with each other.

Sync Facts

Pocket Informant will automatically sync based on the settings chosen by the user:

- Pocket Informant will automatically perform an immediate one-way background sync of changed items as you use Pocket Informant. This feature is smart enough to deal with changes that happen in quick succession
- Automatic Sync will also perform a full two-way sync every user-defined number of minutes (if Pocket Informant is not running after the user-defined interval of minutes from your last sync, it will automatically sync on your next launch)

You can set the time interval of the full sync in the Sync Settings screen.

Please note that while Pocket Informant will run in the background it will not sync until it is the opened or main application.

If you prefer not to have Pocket Informant Autosync, you can disable this by turning it off in the main sync view and enabling the shake to sync option. This gives you total control of when a sync does or does not take place. Simply shake your device to initiate a sync anytime that you like.

It is not advised to use Autosync with the WDS/Desktop sync option as this kind of sync can only take place when the device is on the same LAN as the PC.

Autosync has a setting that will only sync when changes are made instead of when opening the application.

Tasks in Pocket Informant cannot be assigned to specific calendars, during the creation of a task a sync service can be selected and assigned to the individual task provided that the sync service is task compatible.

Calendars/Folders(Projects)/Contexts to Sync

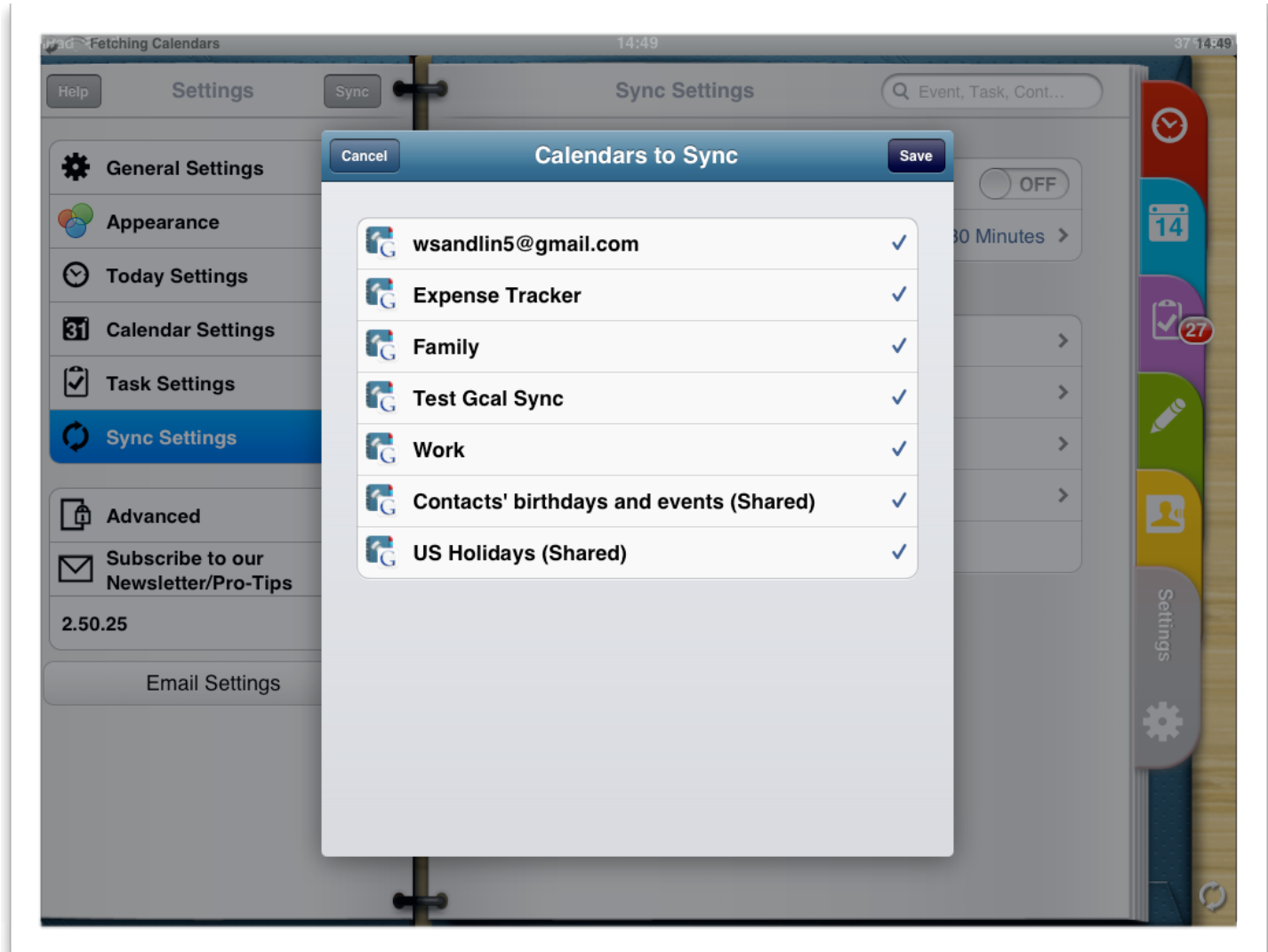
When you setup the synchronization, you must choose which Calendars (for events only) to sync with. Once a Calendar is synced, it will not be deleted if you remove it from the sync list. This is useful when syncing unchanging public calendars such as Holidays. To remove a Calendar from Pocket Informant, visit the Create/Edit Calendars screen in Settings to remove it. It is important to note here that Google Sync now has an enforced rule of once a day syncing of calendars that are ICS imported and a once a week sync for holiday calendars. This greatly speeds up the sync process.

If you are syncing your data to more than one sync source it is very important to understand how this process works. When you set up a new event sync you will need to select which calendars will sync to that source, if you do not do this than any calendar available will be added to that sync source when the first time sync occurs. Calendars can only be synced to one sync source at a time. If a new event sync source has no available calendars it will create its own some of these will likely duplicate calendar names already in use, when this happens the calendar name will show its sync source name in parenthesis.

Tasks, contexts, notes and Folders/Projects must be assigned to a sync service in order to sync. When the Sync to is set on the task only folders and contexts assigned to that same sync service can be selected and applied to the task.

Sync accounts with shared Calendars take substantially longer to sync than your own Calendars because Google's servers take longer to respond for Shared Calendars.

Illustration 6.3 iPad Calendar Sync Selection Screen shown all others similar



Calendars/Sync Services to Sync effect what gets synced

Calendars to Sync for events and sync services selected for tasks are very important because this is what identifies to Pocket Informant what gets synced to what account. Only calendars (events) and sync services (tasks) selected to sync will sync. For events the calendars to sync are set per the individual sync source, any unchecked calendars won't sync to that source but would be able to sync to any new sync source that would or could be added.

Sync Limitations

There are some limitations to the sync services offered in Pocket Informant.

Task support with the WDS sync method and Toodledo are reasonably robust in their support of the task attributes that are available in Pocket Informant. Google Tasks at this time is not so much. All of the basic information will sync, however Pocket Informant task attributes that are not supported by Google Tasks will remain visible on your device unless a reset sync with Google Tasks occurs. If that happens the tasks shown in Pocket Informant that are synced with Google Tasks will lose their Pocket Informant attributes and will only show the information supported by Google Tasks.

None of the built in Pocket Informant sync solutions will sync iOS Calendar events.

Calendars can only be synced with one sync partner.

Tasks can only be synced with one sync partner.

Contexts and Projects/Folders do have to be assigned to a sync partner and can only sync to that specific partner.

Tasks cannot be assigned to specific calendars, they are assigned to specific sync services.

Alarms synced to Toodledo will be set to noon unless you are using a Toodledo Pro account. Toodledo Pro does support alarms, however the alarms have to be converted during the sync into a format that Toodledo will understand so a reset sync may or may not bring back all of the task alarms.

If you are using iOS 4.3 or older you will not be able to sync with Pocket Informant Online.

Removing A Sync Service

Removing a sync service is very simple and straightforward. In the sync settings of Pocket Informant select the sync that you want to remove. In the details of that sync near the top of the view you will see a remove button. Tap that button you will then be presented with two choices. Remove the account or remove the account and data. These are self explanatory, removing the account only will leave all of its data in Pocket Informant. This data can now be synced with other sync sources if applicable. Removing the data and the account will take the account away and all of its associated items in the database, that can include any associated tasks, events, and notes.

Dropbox

Pocket Informant has the ability to sync with DropBox, but in the sense of a true sync it is does not work like the other sync services mentioned in this chapter. First if you do not already have a Drop Box account you can create one from within Pocket Informant. Once you have an account to link with you will see the screenshot as shown in the screenshot at right.

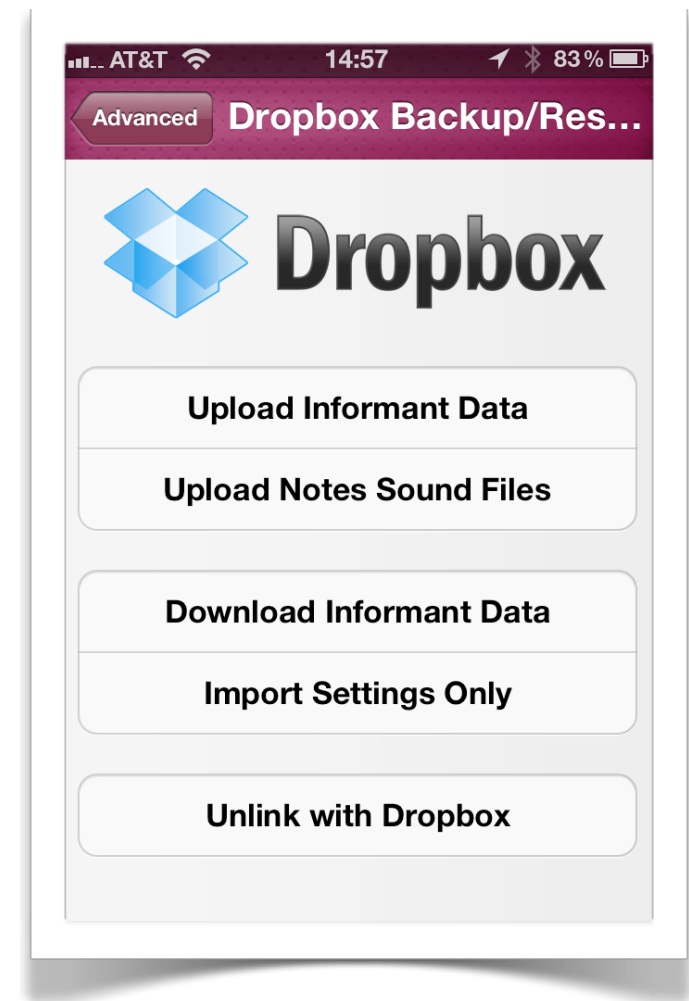
Upload Informant Data-This will copy the Pocket Informant database, preferences and voice notes files and upload them to Dropbox.

Upload Notes Sound File-A copy of the Voice Notes files will be synced to Dropbox when you tap this button.

Download Informant Data-This button will overwrite all existing Pocket Informant databases and preferences and replace that information with information downloaded from the Dropbox. For some users who want share settings and data between devices this is an efficient and easy way to accomplish that.

Import Settings Only-Tapping this button will import the settings files only to Pocket Informant. If you are a user with multiple devices and want them to have the same settings across them this option will allow you easily import the settings from one device to another.

Unlink With Dropbox-This will terminate the link with Dropbox.



Native iOS Calendar Access

It is important to understand what this is and what it is not. It is not a sync, but instead a direct reading of the existing calendars and events that live on your device. It also has nothing to do with task support because the iOS Native calendar itself has no native task support

You may find that if you sync your iOS device (via CalDav or other method) to the same calendar data set as Pocket Informant through Google that when you turn on native iOS calendar access your calendar looks like it is duplicated. In a strict sense this is not true. Because this access is not sync Pocket Informant is now reading both its own calendar data as well as the native calendar data on device so it will show data in both sets. They do not intermingle however. **It is strongly recommended that you do not sync the same data to Pocket Informant and the native iOS calendar simultaneously as you are creating a sync loop which can create duplicates and cause battery drain.**

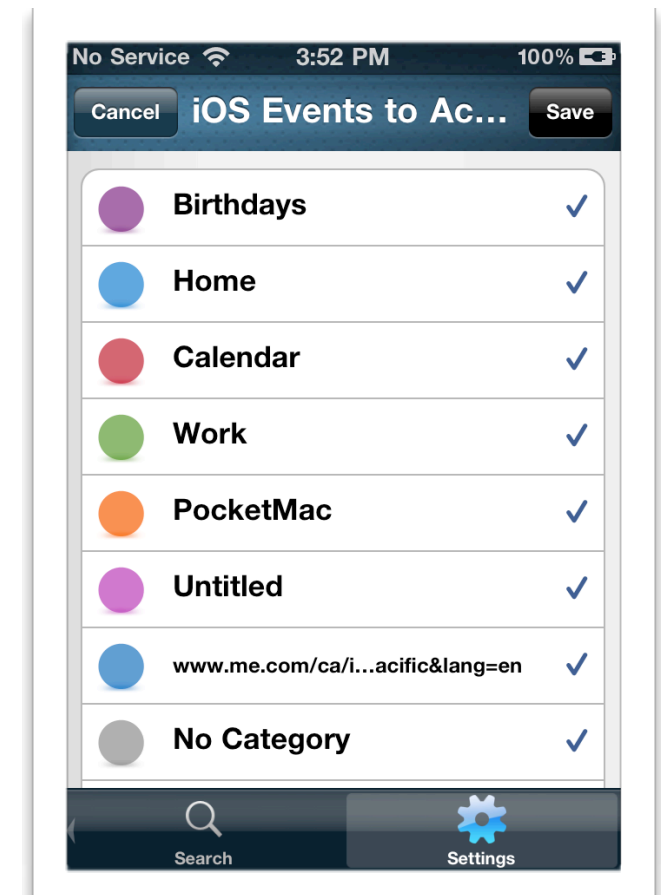
One of the benefits of native calendar access is that anything that syncs events to the built in calendar in your iOS device will now be visible in Pocket Informant. Events generated within Pocket Informant using these native iOS calendars will also be visible back the other direction and will show on the native calendar and the sync partners of the local calendar.

A few limitations exist in native iOS event access:

- Events before 1933 are not supported, either through Birthday support or trying to create the events (this should be fixed in iOS 5 and above). Events such as birthdays before 1933 will show up on December 13th or 14th of the year you are looking at.
- Meeting attendees are not supported unless you use the iOS Editor (in settings)
- Calendar editing or deletion is not supported on iOS 4 and below
- Alarms for native events will bring up the native calendar, not Pocket Informant.
- Any Pocket Informant specific fields such as icon and tags are not supported for iOS calendar events.
- Event time zones are not supportedIt is important to understand that these limitations are not ones we can work around but are intrinsic to the iOS interfaces that we're using to access the calendars. As Apple improves these interfaces, so will our support of them.

These limitations are are intrinsic to the iOS interfaces that we're using to access the calendars. As Apple improves these interfaces, so will our support of them. We are not syncing data but reading the data directly. Pocket Informant is not a bridge between the iOS calendars and Google. Syncing with Google, Pocket Informant Online, or WDS, does not mean that your iOS calendar items will show up there. iOS events do not sync to any of the current sync services. iCloud comes into play here only in the fact that it will sync the native iOS calendar data to its own calendars.

Illustration 6.4 iPhone iOS calendar access selection all devices similar



Settings

Detailed explanations of the Pocket Informant Settings can be found [here](#).



Settings View

The Settings View allows you to see and set all of the options in Pocket Informant. One of the great features of Pocket Informant is the flexibility it affords you the ability to configure it to what fits you the best. (iPhone screens are shown here but all devices are similar)

You are encouraged to try out the different settings to see just how flexible Pocket Informant is and to find a custom fit that maximizes all that Pocket Informant has to offer. The settings are divided into six categories listed below

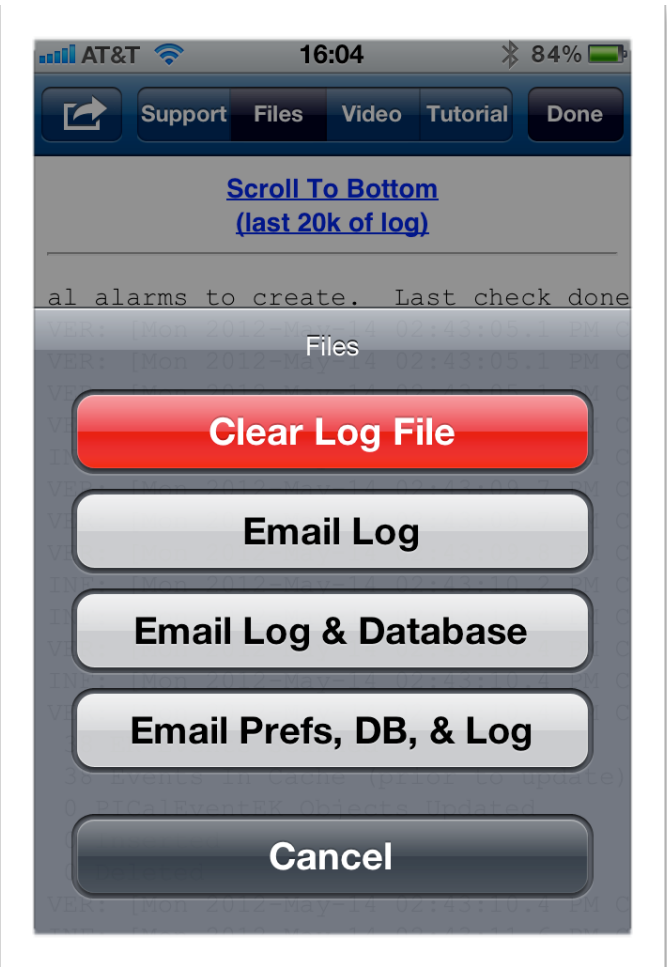
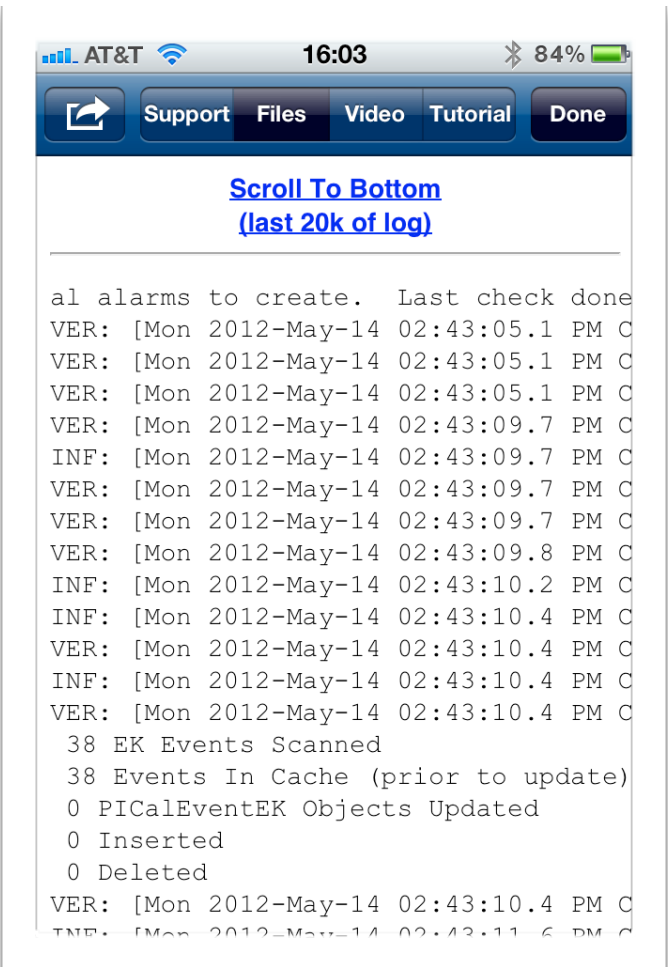
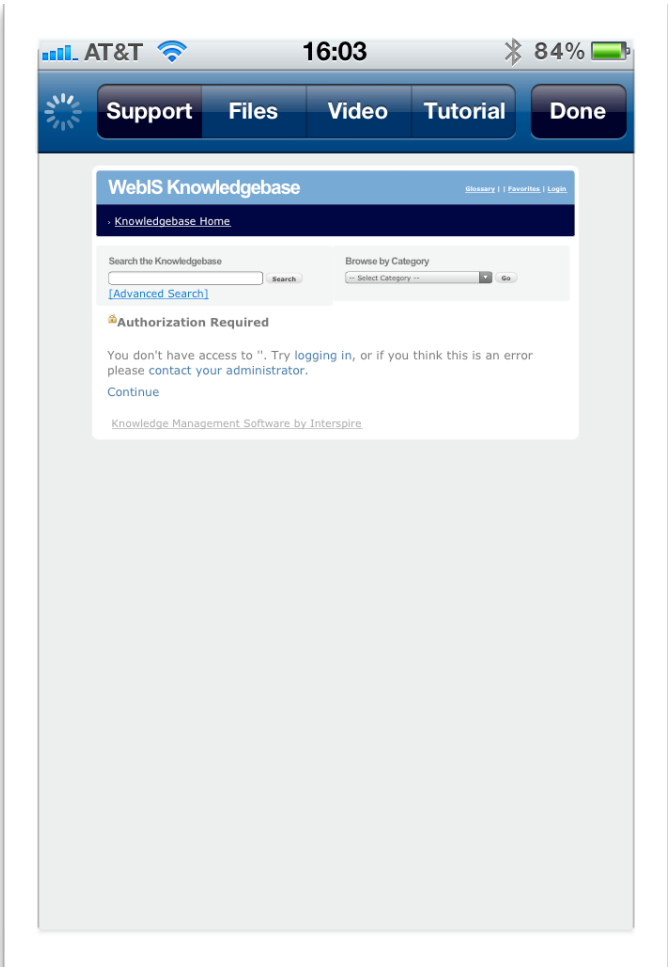
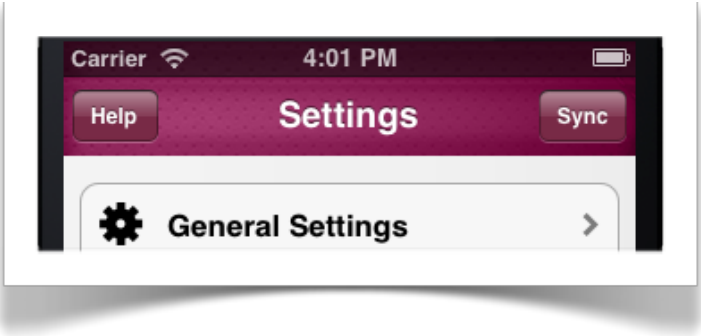
First - There are two important buttons at the top of the screen:

Sync

This button on the top left of the screen will initiate a sync with all of the active sync services in Pocket Informant.

Help

This button opens a submenu that provides access to the WebIS Knowledge Base, helpful videos and the initial tutorial video. The “Files” button allows you to view the Pocket Informant log.



By tapping the action button in the top left a second menu will come up. This menu allows you to send various Pocket Informant files directly to us for assistance in troubleshooting and helping to resolve any issues that you may encounter.

General Settings

Application Badge

Pocket Informant can be set to use a standard iOS icon badge. This badge can be customized to show counts of overdue Tasks, today's Events, Next Actions, etc.

Owner Info

This information in here is used for sending out Meeting Invites. This is also a place you can fill out registration info that will help WebIS know what products our customers are using and which solutions would be good for us to partner with.

Password

It is now possible to secure access to Pocket informant with a password. A four digit password can be entered. Users can determine when the password will be required. To remove a password simply go back to the password settings and tap the trash can icon in the top right of the view. This will remove the password from Pocket Informant. This is an application lock and not a data lock.

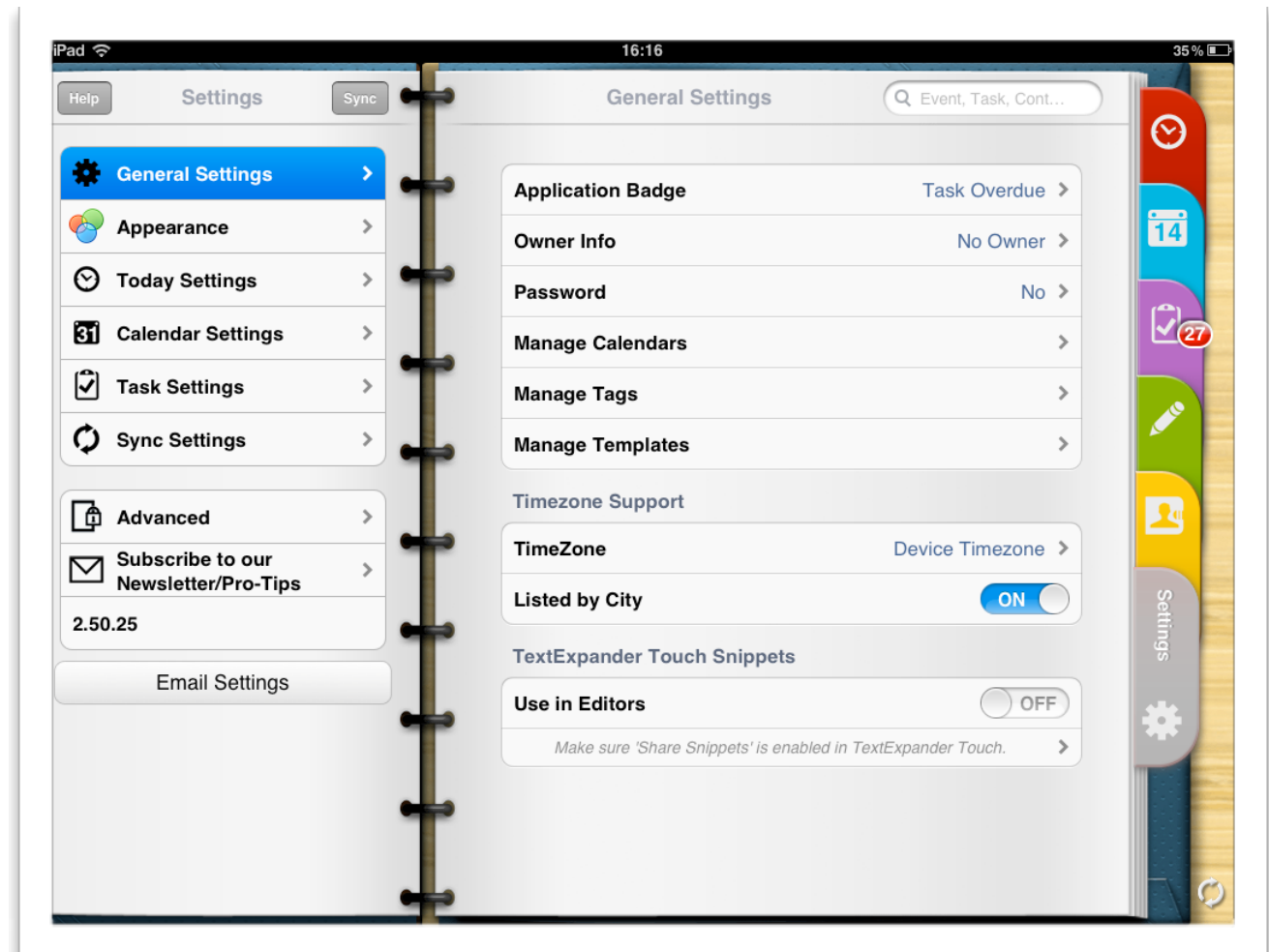
Manage Calendars

In this area of the settings you can set up various Calendars and choose color representations for each. These settings will affect how Events show in the various Calendar Views. The default Calendar is clearly indicated in the listings. This means that unless otherwise specified, an Event will default to this Calendar. The default Calendar can be renamed and re-colored if you choose, but it cannot be deleted until you make a different Calendar the default. More Calendars can be added by pressing the **Add (+)** button in the upper right of the Navigation Bar. Tapping an existing Calendar will bring up the color palette and offer the option to rename the Calendar. To delete a Calendar, swipe to the right and press **Delete**. Calendars can have icons and specific time zones added to their attributes. If you are syncing your data it is important to note here that now any new calendar will need to be assigned to a sync source.

Manage Tags

Pocket Informant tags and tag colors are managed here. Tags can be added by pressing the + plus button or removed by doing a "delete" swipe over the tag. Existing tags can be edited here by simply tapping on them, you will be taken to the edit screen. This is the same screen you will see when adding new tags.

Illustration 7.1 iPad General Settings show all devices similar



Manage Templates

Pocket Informant templates are managed here allowing you to create and edit templates.

TimeZone Support

Here you can set global (entire application) time zone preferences. The default setting is automatic meaning that the device timezone information will be used by Pocket Informant. However, should you have the desire or need, by tapping this selection, you can set PocketInformant to any timezone you like.

Time zones can be listed by city for more convenient choosing by moving the slider labeled Listed by City to the On position.

TextExpander Touch Snippets

Please see Chapter 2 of this user guide for detailed information on TextExpander Touch. This is a simple toggle to turn on or off the TextExpander Touch feature.

Appearance

Theme/Desk Theme

Theme's are new in Pocket Informant. On the iPad the Desk Theme is selectable this allows you to customize the desk surface look that Pocket Informant uses. On the iPhone the Theme's change the color scheme of the user interface. The color choices do not impact functionality at all.

Max Title Display

This setting allows users to determine how many lines are displayed in the event or task title. There are multiple choices, ranging from all lines to a single line. The default is one line.

Past Appointment Style (Events)

This setting allows users who have need to differentiate past appointments and completed tasks with a different look to do so. There are four choices, None, Italics, Small Text and Faded. Whichever setting is chosen will determine how past appointments and completed tasks will look throughout the views.

Month Cell Font Size

This setting determines how large the fonts look in the Month View cells. The larger the font the less information can be displayed.

Color Display (Events)

This is another flexible visual aid that can help users at a glance, identify events quickly and easily throughout the calendar views of Pocket Informant. This setting determines how the user will see the items, they can either appear with the cell colored, the text colored, or no coloring. The coloring will be determined by either the tag or the calendar that the item is applied to.

Use Tag Colors (Events)

Tag colors help users identify an item by relating it to an activity such as work, family, etc. When enabled, the tag color shows on the item layered over the calendar color.

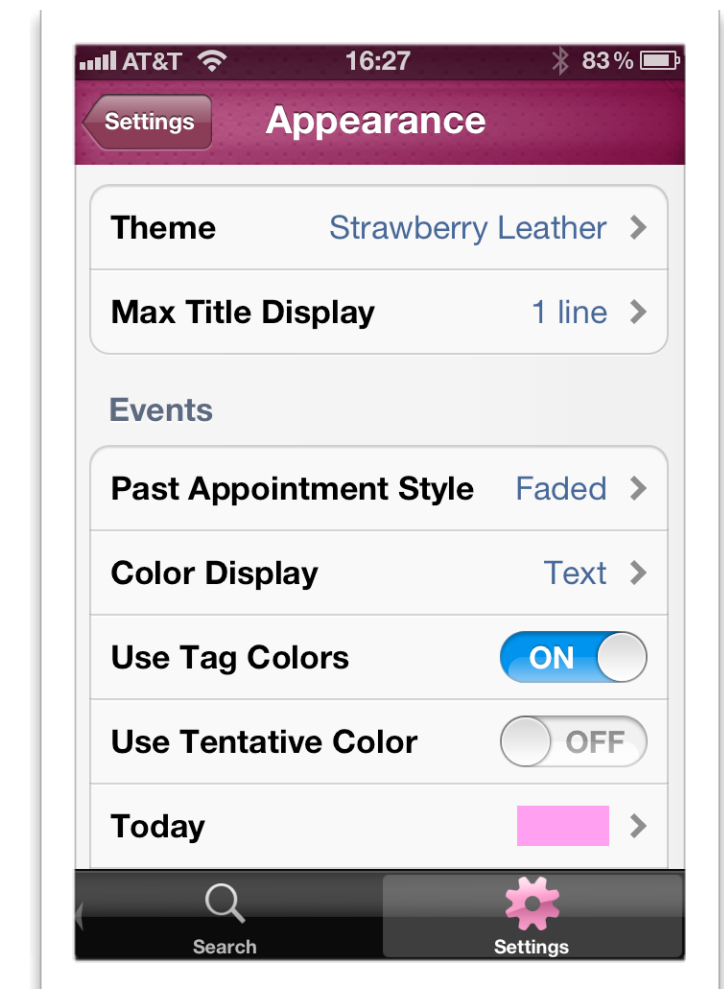
Use Tentative Color (Events)

This setting enables a color that comes from Google Calendar for tentative items synced down. This setting works for some Google calendar users but not for all. We have not been able to isolate when or when not this option comes into play. For our users who do see this option work, sliding this to the on position will allow you to see that color from Google in Pocket Informant.

Today (Events)

This setting determines the color that will be displayed when the current day is displayed in the calendar views.

Illustration 7.2 iPhone appearance screen shown all others similar.



Weekdays (Events)

This setting determines the color the weekday headers will be displayed in. This setting applies to the Week View and List View.

Weekends (Events)

This setting determines the color that the weekend headers will be displayed in, this setting applies to the Week View and List View.

Current Month Weekdays (Events)

This setting determines what color the current month’s weekdays will be displayed as in the Month View.

Current Month Weekends (Events)

This setting determines the color the weekends in the current month will be displayed as in the Month View.

Title Font Size

This setting determines how large the font is in the title lines of events and tasks. The choices are small, medium and large, with medium being the default. It is important to note here that the smaller the font size the more text will be visible in the various views.

Month Cell Font Size

This setting determines how large the fonts look in the Month View cells. The larger the font the less information can be displayed.

Week View Font Size

This setting determines the size of the font in the week view. The larger the font the less information can be displayed.

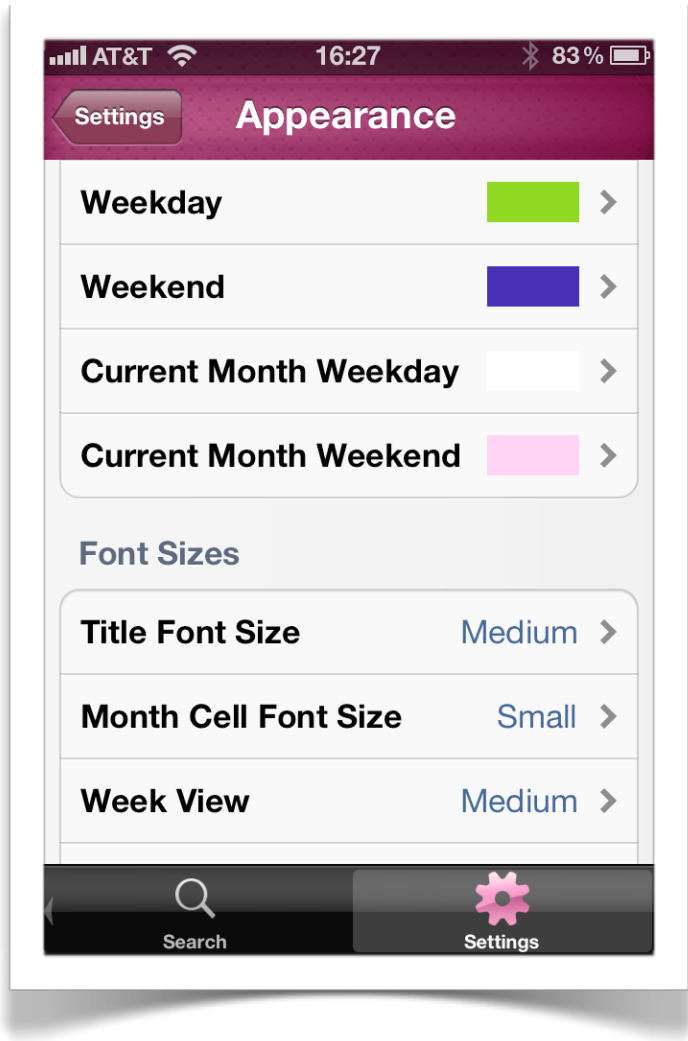
Day View (All Day) Font Size

This setting determines the font size in Day View for all day events.

Color Display (Tasks)

This option operates identically to the color display setting for events. Colors are a visual aid that can help users, at a glance, identify events quickly and easily throughout the task views of Pocket Informant. This setting determines how the user will see the items. They can either appear with the cell colored, the text colored, or no coloring. The coloring will be determined by either the tag or the calendar that the item is applied to.

Illustration 7.3 iPhone Appearance screen shown all others similar



Use Tag Colors (Tasks)

Again the use of tags in tasks is identical to that used in events. Tag colors help users identify an item by relating it to an activity such as work, family, etc. When enabled The tag color shows on the item layered over the calendar color.

Overdue (Tasks)

This is the area where the color for overdue tasks is set. If you need a “red alert” so to speak when a task goes overdue or of you want something a little more subdued, this can be determined and set here. In the various task views this is the color set for any tasks that are overdue.

Priorities (Tasks)

Pocket Informant has many different priorities that can be applied to tasks. In these settings you can select the display color for all of the priorities and the text for each of these same priorities.

Carousel Mode (Contacts)

In the contacts view, when in the landscape orientation, this setting will determine how contacts with photos will be displayed. The choices are Flat, Cylinder, Flow, and Flip. Flat is a simple left and right swipe of the photos. Cylinder adds the effect of the photos being on a round cylinder as they are displayed. Flow is a smooth left and right view. Flip is like the landscape view in the music player in that each contact flips in and out of view.

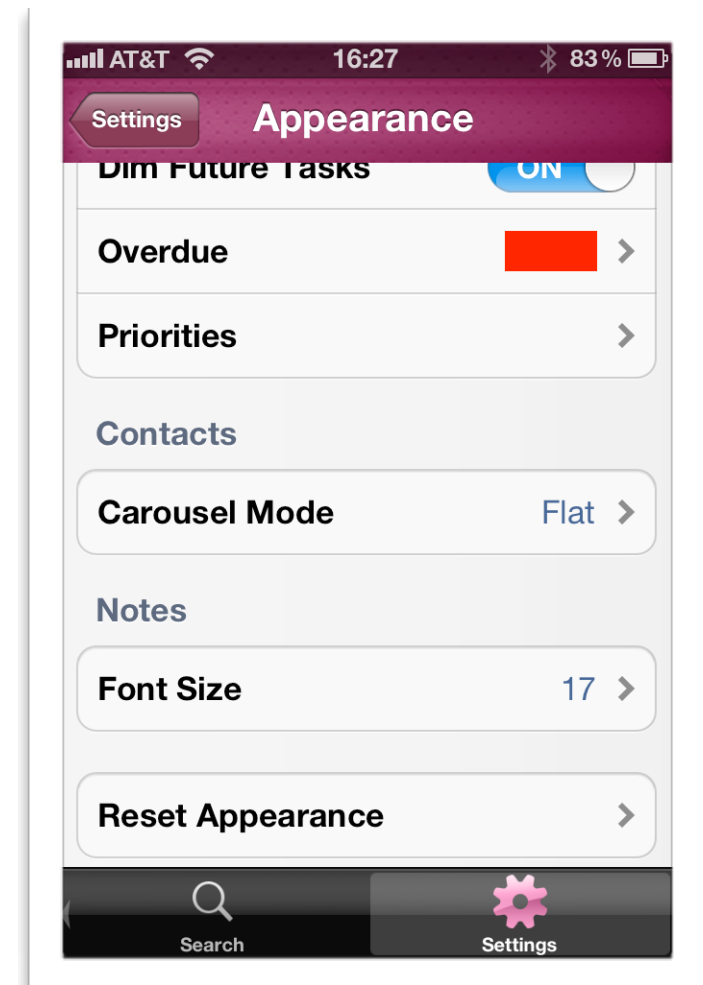
Font Size (Notes)

This setting will determine the font size for notes that are in Pocket Informant. The bigger the number the larger the text will appear.

Reset Appearance

This button will restore all appearance settings back to the factory defaults.

Illustration 7.4 iPhone Appearance screen shown all others similar



Today Settings

In this view, you can enable or disable the elements that are visible in the Today View. The available elements will vary depending upon the task mode selected, not all Today elements are available in all of the task modes. All elements are listed below. Any elements set to “On” will be visible in the Today View.

Next Actions

Displays tasks that are marked with a Next Action.

Tasks Completed

Shows the tasks completed today.

Alarms

Shows the alarms scheduled for today.

Attendees

Displays the names of the attendees for Today's events.

In Progress Tasks

Will show all of the tasks that are in progress for that day.

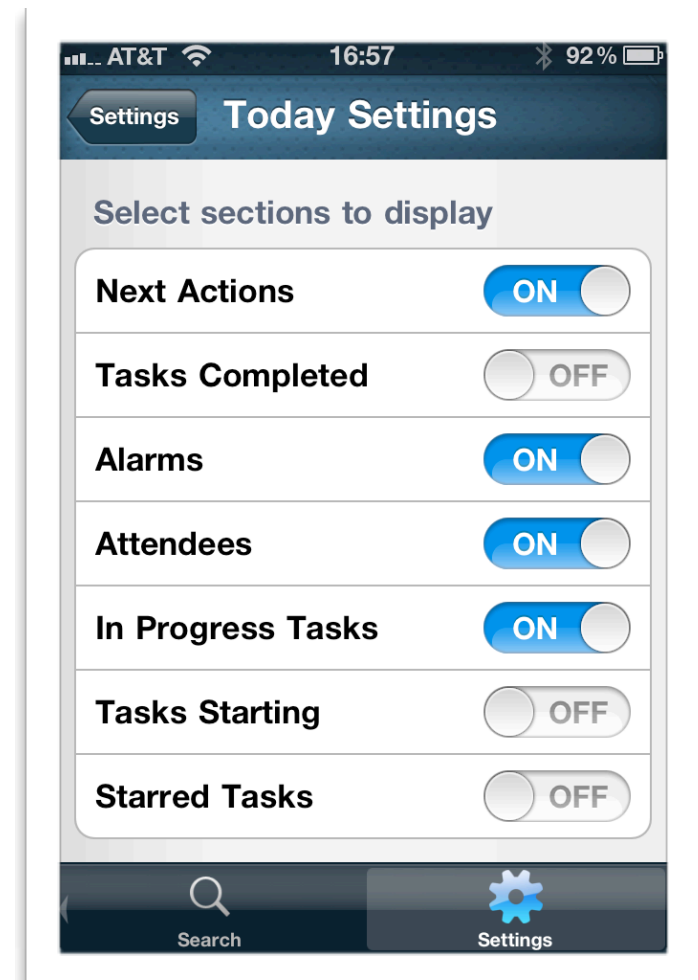
Tasks Starting

Will display all tasks starting today.

Starred Tasks

This setting will show all of the starred tasks for today.

Illustration 7.5 iPhone shown all others similar



Calendar Settings

Manage Calendars

In this area of the settings you can set up various Calendars and choose color representations for each. These settings will affect how Events show in the various Calendar Views. The default Calendar is clearly indicated in the listings. This means that unless otherwise specified, an Event will default to this Calendar. The default Calendar can be renamed and re-colored if you choose, but it cannot be deleted until you make a different Calendar the default. More Calendars can be added by pressing the **Add (+)** button in the upper right of the Navigation Bar. Tapping an existing Calendar will bring up the color palette and offer the option to rename the Calendar. To delete a Calendar, swipe to the right and press **Delete**. Calendars can have icons and specific time zones added to their attributes.

iOS Events

Pocket Informant supports the native iOS or built in calendars on your iOS device. See native calendar support elsewhere in this manual for further information on this feature. There is also detailed information in the application itself regarding this setting.

iOS Events Settings

Think of this area as a “Manage Calendars” section for iOS calendars. Here you can decide what iOS calendars will be visible and therefore useable in Pocket Informant.

ISO Week Numbers

This turns on the display of the ISO week numbers on the day titles within the Calendar Week View.

Default Calendar Alarm

This setting allows you to automatically attach an alarm to any new events that you create.

Work Hours

This is where you can define the hours of the work day by selecting start and stop times. This setting is used to shade work hours in Day View and the time-bars in Week View.

New Event Duration

This setting lets you determine the default duration of new Events that you create.

Alarm Notification Sound

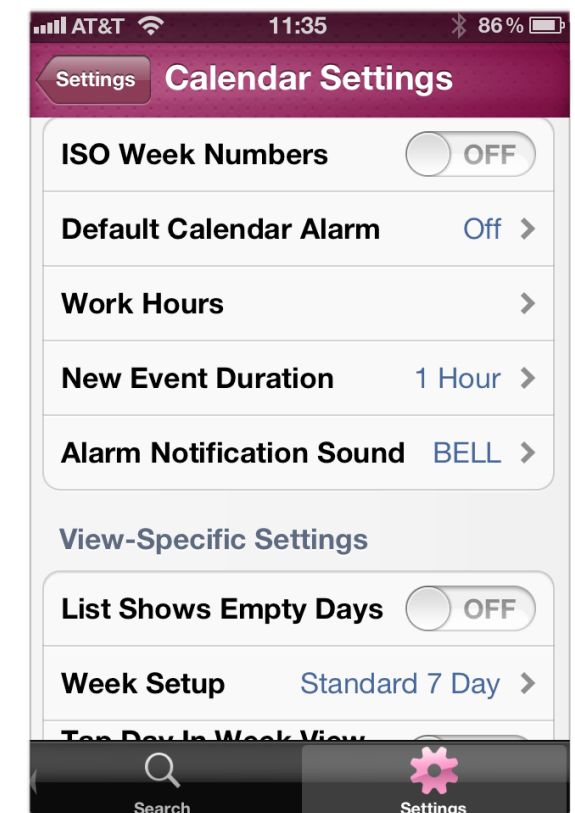
This is the area where you can set the default alarm sound for events.

List Shows Empty Days (View Specific Settings)

When enabled this will include empty days in the list views so that you can easily identify them.

Week Setup(View Specific Settings)

This setting allows you to determine the way the Week View will look. The choices are Standard 7 Day which shows the



week with all days floating and current days are shown near the top of the view. The other choice is 7 Day Split which splits the sixth and seventh day in the view into one cell. The final choice is weekdays only, this settings will only allow weekdays to be displayed in the week view.

Tap In Week View Opens Detail View (View Specific Settings)

When enabled this setting allows you to see the detail of all the items in a day when tapping inside of the day cell.

Week Orientation (View Specific Settings)

This setting determines how the week will be displayed the choices are Left to Right or Top Down.

Month Cell Style (View Specific Settings)

You can determine how the days will appear in the Month View. There are five different choices: Number Only, Time Bar, Mini-Text, Mini-Text (including time), and Mini-Text w/Colored Background.

- Number Only-Will display only the number of the day in the Month View.
- Time Bar-Will show the time bar in the day when in the Month View.
- Icon-Will only show item icons in the Month View.
- Mini-Text-Will show a portion of the description in the day.
- Mini-Text (including time)-Shows the same as Mini-Text but adds time to the display.
- Mini-Text w/Colored Background-This setting will display the event info with a colored background. The background color will be that of the calendar that the event is attached to.

Day View Maximum All Day Events To Show (View Specific Settings)

This setting will determine the maximum number of all day events that will be visible in the day View before scrolling will be needed to view them all. The numbers are None then run from 4-10.

Week View Time Bars (View Specific Settings)

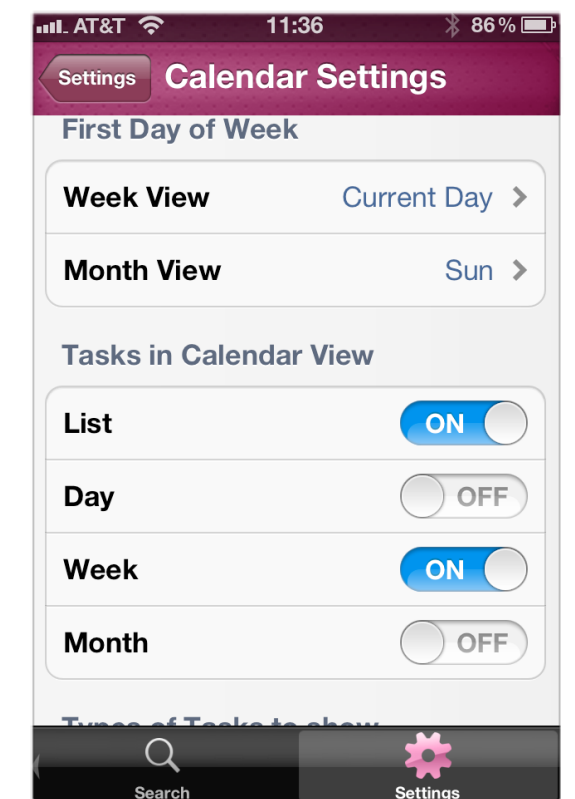
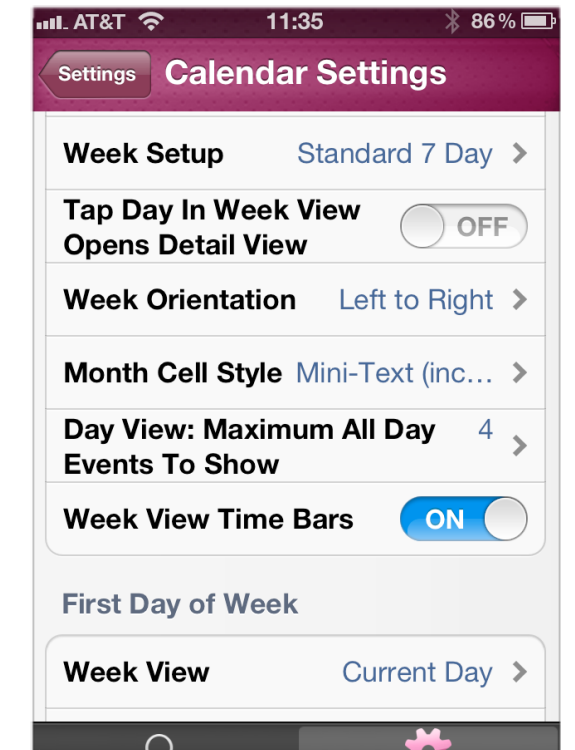
This setting will toggle the time bars on or off in the week view.

Week View (First Day Of Week)

This setting will determine when in the week view what day will be displayed at the top of the view. The default setting is the current day.

Month View (First Day Of Week)

This setting will determine what day shows as the beginning of the week in the month view. The default is Sunday.



List (Tasks in Calendar View)

If enabled this setting will show tasks in the list view.

Day (Tasks in Calendar View)

If enabled this setting will show tasks in the day view.

Week (Tasks in Calendar View)

This setting will enable tasks to show in the week view.

Month Cells (Tasks in Calendar View)

When enabled this setting will show the tasks in the month view cells.

Method (Types of Tasks To Show)

This setting determines what kinds of tasks are displayed in the calendar views. The choices are Due and Overdue or In Progress.

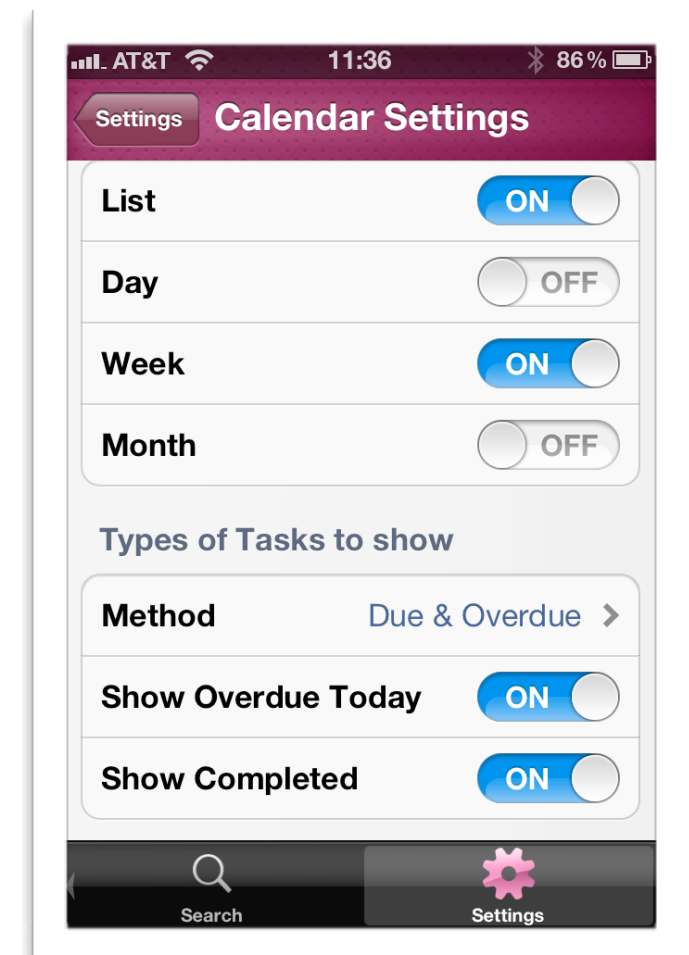
Show Overdue Today (Types of Tasks To Show)

With this setting enabled the overdue tasks will show in the calendar views.

Show Completed (Types of Tasks To Show)

This setting will display the completed tasks in the calendar views if enabled.

Illustration 7.6 iPhone shown all devices similar



Task Settings

Task Mode

In this part of the settings you can determine which method(s) will be used for the Task list; Standard (formerly known as ToodleDo), FranklinCovey, GTD and Simple are the available modes.

Alarm Notification Sound

This setting is where the default alarm sound for tasks is set.

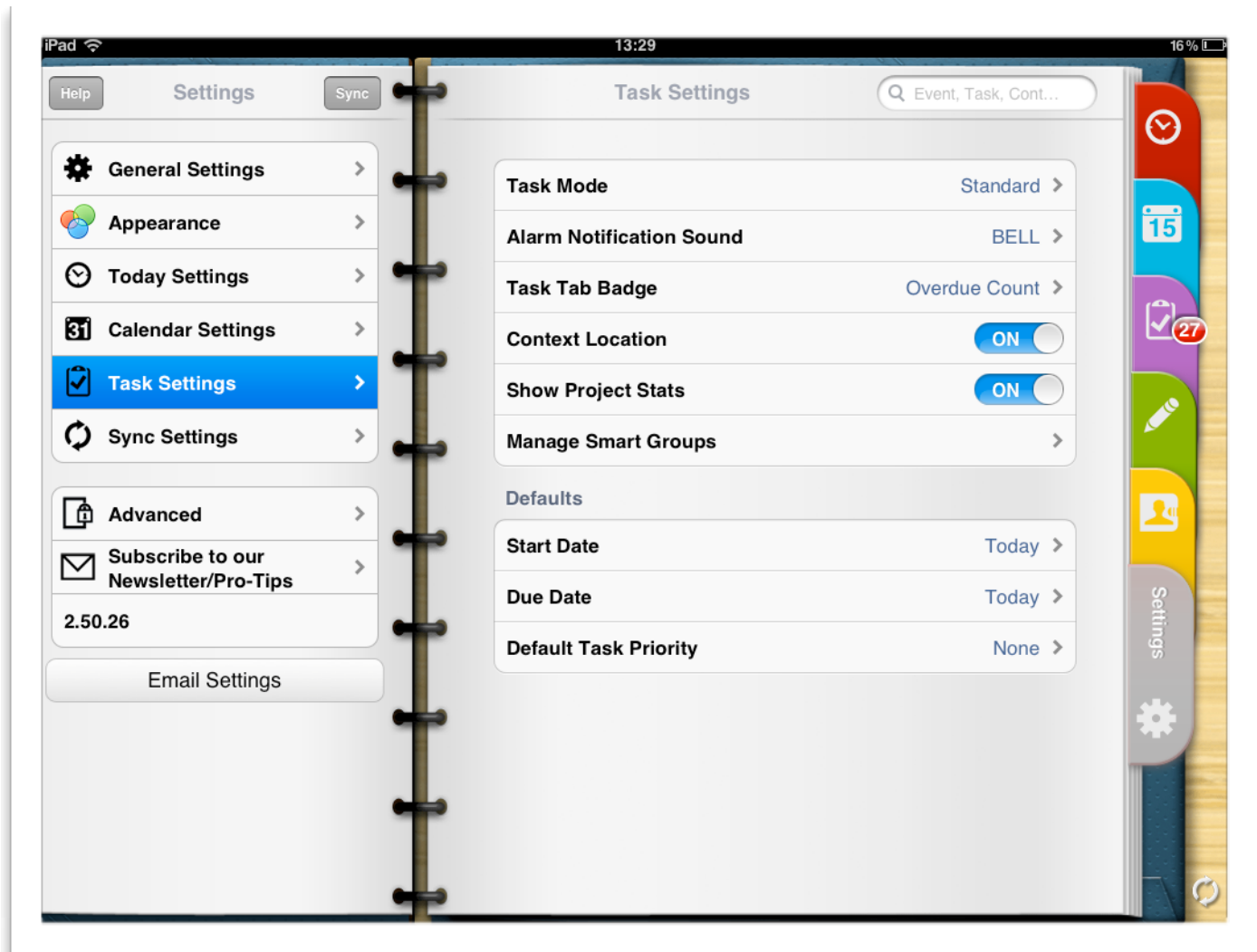
Task Tab Badge

The To Do button at the bottom of the Pocket Informant screen will show a red badge, this setting determines what is indicated by that red badge. The setting None deactivates the badge feature. Selecting Overdue Count will show the number of overdue Tasks. Choosing Due Today Count will display the number of items due today. And selecting Both will show a red badge that has a combined number comprised of overdue items and items due today.

Context Location

This feature in Pocket Informant when enabled allows you to add addresses to your task contexts. When you are near that address, Pocket Informant will alert you to the fact that you have a task corresponding to your current location. For example you can set a context called “Shopping” and put in the address of the store. You can then create a task for shopping. When you are out and about during your day, if you are near the store, Pocket Informant will alert you to this fact and show you the task associated with it. To add an address to an existing contact open to the contexts manager, in the Task View, turn on Location Alarms with the slider and tap the edit button. This will make all of the contexts editable. Tap the context that you want to add an address to, tap the mapping symbol next to the context name. Enter the information such as store name or as much of the address as you have. The map view will then move as close as it can to the desired address based on the information entered. You can move the push pin on the map to the desired location then select the option to use this location. Now there is a physical address associated with this context. Addresses need to be entered in the following format to be as accurate as possible; Address>City>State>Zip. Otherwise they may not be found. If Pocket Informant doesn’t seem to find the address you are looking for try entering some variants of it.

Illustration 7.7 iPad shown iPhone and iPod Touch similar



Show Project Stats

In the task view in all modes except the Simple Task mode, tapping into a project/folder shows a dashboard. This dashboard shows the stats of the project. If you do not wish to see this but only want to see the project content simply move this slider to the off position and the dashboard will not be visible. When enabled you will need to drag down the view inside the folder to see the dashboard.

Manage Smart Groups

Smart Groups are a powerful new feature in Pocket Informant 2.5. In the “Tasks” section of this user guide they are discussed in detail. This menu selection takes you to the full Smart Groups editor where Smart Groups can be created, edited or deleted. In summary, think of Smart Groups as user defined filters for tasks.

Start Date (Defaults)

When this is on, Pocket Informant will automatically set a Start Date of "today" on all new Tasks that you create.

Due Date (Defaults)

This feature when enabled will determine the default due date for new tasks. The default selection is “Today”.

Default Task Priority

You can set the default Task priority here. This is what Pocket Informant will use when setting up a Task as a default if no importance setting is selected when adding an item.

Default Sync Account

Setting a default sync account means that any task created will have the Sync To field populated with the sync account chosen in this setting.

Color for Unsynced Tasks

In the task view, unsynced tasks will be shown in the color selected here.

Icon for Unsynced Tasks

If used the tasks that are unsynced will show the icon selected in this setting.

Sync Settings

Pocket Informant comes ready to sync with Outlook, Google Calendar, Google Tasks, Toodledo and Pocket Informant Online. This setting is where the sync method(s) are chosen. The following information on the various sync services is written from the perspective of already having the sync services set up. For more detailed information including how to set up a synchronization, please see the “Synchronization” chapter of this user guide. An exciting new feature in Pocket Informant 2.5 is that it is now possible to configure and use multiple sync sources at the same time.

All sync settings can be edited from this view.

Data from the iOS calendars does not sync via any of the sync services.

Shake to Sync

When this is on, you can give your iPhone a shake to do a full two-way sync between Desktop, Google Calendar/Tasks, Pocket Informant Online and Toodledo.

AutoSync

Pocket Informant automatically syncs up any changes made within Pocket Informant *immediately*, but it also checks the server for any changes to sync down. This option lets you pick the time interval that the full server sync is performed. If Autosync is set to the “On New/Delete/Edit Only” setting then Pocket Informant will only perform a sync when a new item is added, deletion is done, or an edit to an existing item is made. This means that Pocket Informant will not sync when it is initially opened from the background.

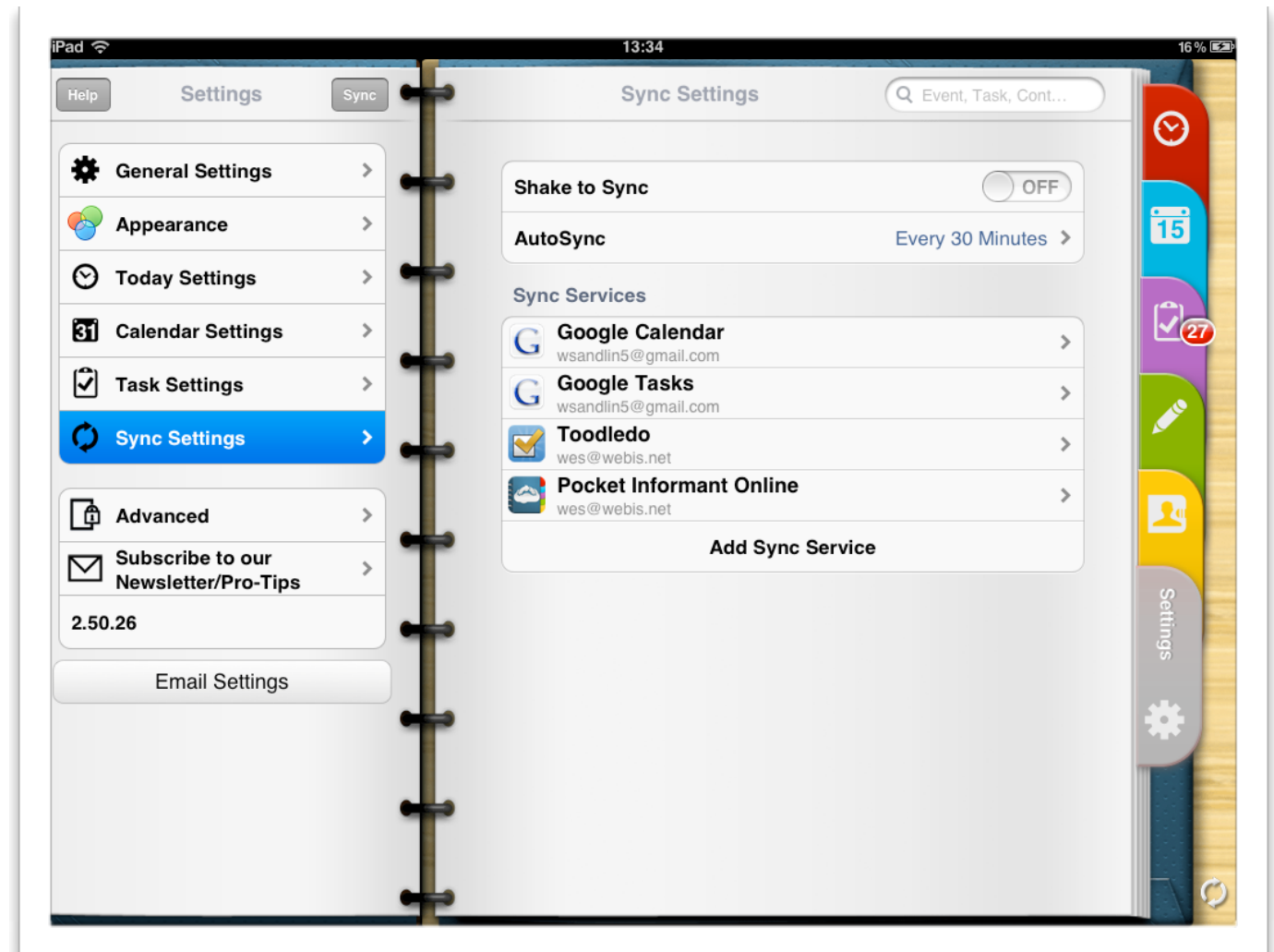
Desktop Sync (Windows Only)

To enable the desktop syncing with Outlook for Windows, simply turn this switch to On. To disable desktop syncing simply move the slider to the Off position. Pocket Informant will need to have been previously paired with the PC and be on the same network as the PC for sync to operate properly. At this time it is not recommended to set desktop syncing to automatic unless you will be using your device exclusively on the same network as the paired PC at all times. Check this doc/link (Please see the WDS Sync document at <http://webis.net> for detailed information on configuration and use of the Outlook sync feature.

Google Calendar/Tasks

To enable syncing with Google Calendar/Tasks, turn this switch to On. To disable syncing with Google Calendar, move the slider to the Off position.

Illustration 7.8 iPad Sync Settings shown all others similar



Toodledo

To enable syncing with Toodledo, turn this switch to On. To disable syncing with Toodledo, move the slider to the Off position.

Pocket Informant Online

To enable syncing with Pocket Informant Online, turn this switch to On. To disable syncing move the slider to the Off position.

Advanced

The Advanced area of the settings is for more complicated Pocket Informant settings. The backup system settings reside here, as well as version information, and logging. The version information is very important when working with Support to resolve any issues that may arise.

Backup/Restore (Database)

Pocket Informant makes automatic backups of its database. These backups can be restored at any time by simply selecting the one you want to use and then choosing the appropriate action button from the menu at the bottom of the screen. You can also make an immediate backup by simply tapping the “Backup Now” button. Pocket Informant manages its backups, it makes them periodically and always before a reset sync operation or an erase local data option. From these settings you can also email and delete backup files. These backups are for the data only and do not include settings.

Dropbox Data Sync/Backup (Database)

This feature will allow you to save your data from Pocket Informant to Drop Box for backup purposes. Drop Box is a free online backup service that will save your database files, preferences and voice notes. To sync with Drop Box click on the ‘Drop Box Data Sync’ section in the advanced settings. Once there you will see a button that says ‘Link with Drop Box’. Click on that and you will be redirected to dropbox.com. You can then sign in with an existing account or create a new one. After you do that all of your files will be automatically synced to your Drop Box account. In the future when you come back to this section it will say ‘Linked with Drop Box’ so you know your files are being backed up. This is an all or nothing sort of backup when it comes to recovery. What we mean by that is selecting a backup from DropBox and restoring from will overwrite everything in your Pocket Informant installation. Settings and data will all be overwritten with the data from the backup file.

This feature makes copying settings and a database across multiple devices very simple. In an enterprise environment an unlimited number of iOS devices running Pocket Informant can be configured identically, also for our users that use an iPhone and an iPad together this type of data transfer can make setting up your second and third devices very simple and efficient.

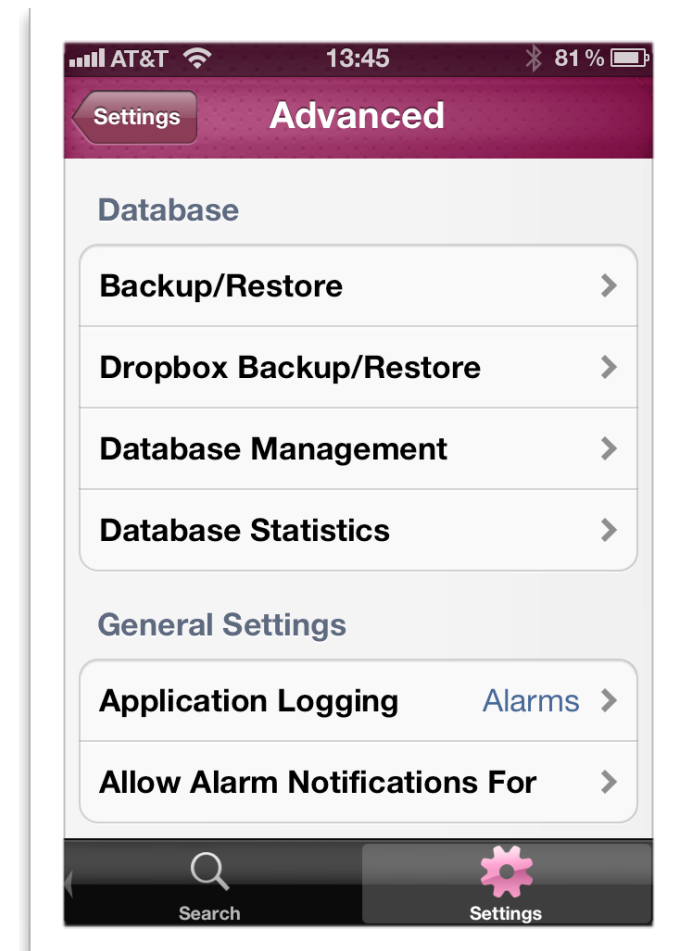
Database Management (Database)

In this section, if needed you can completely erase the Pocket Informant database and essentially start over. This would let you start from scratch, for example, and let you sync down all data from Pocket Informant Online, Google, WDS and Toodledo again. NOTE: This option **will erase all local data** (Events, Notes and Tasks). Before erasing your data Pocket Informant will automatically make a backup of your database which you can retrieve using the above Backup/Restore option.

It is very important to note here that with iOS calendar support turned on, erasing the local or Pocket Informant data will have no effect on the iOS calendar items.

Within this section you can also reset your alarms. The way that your iOS device handles alarms is actually quite simple. When you create an item in Pocket Informant that has an alarm Pocket Informant informs the iOS Alarm Handler. This alarm handler then notes when the alarm is needed and fires it at the appropriate time. Sometimes this

Illustration 7.9 iPhone shown all devices similar



service get confused and the way to correct it is to press the reset alarms button. This function tells the iOS Alarm Handler to cancel all of the Pocket Informant alarms then it replaces them with all new alarm notifications. The end result is that your alarms should work properly and fire as desired.

The Reset Cache option should be used if you experience unexpected behavior with the application. This will clear the temporary memory that Pocket Informant was using and in a sense refresh it.

Database Statistics (Database)

In this view you can see the number of items you have in you database broken out by Calendar Items, iOS Calendar Items, Task Items, Note Items, Projects, Tags, Contexts, Templates, and Notifications.

Calendar Items-Includes the count of all items in the Pocket Informant calendars.

iOS Calendar Items-Shows the count of Pocket Informant items from the iOS native calendar. It shares a database with Pocket Informant and can be accessed by turning on the iOS Calendar Support in the Calendar Settings of the application.

Task Items- Shows the total number of tasks in the database.

Note Items-The count here is showing all of the note items, text notes and voice notes.

Projects-This field shows the number of projects that are currently in the Pocket Informant database.

Tags-This is the total count of tags that are current in the Pocket Informant database

Contexts-The number of contexts that are in the database will be displayed here.

Calendars-The number shown here represents the total number of Pocket Informant calendars and does not include the iOS calendars being displayed in Pocket Informant. This count also does not include Pocket Informant virtual calendars such as the Internal Task Calendar.

Templates-In this field you will see the count indicating how many templates Pocket Informant currently has in its database.

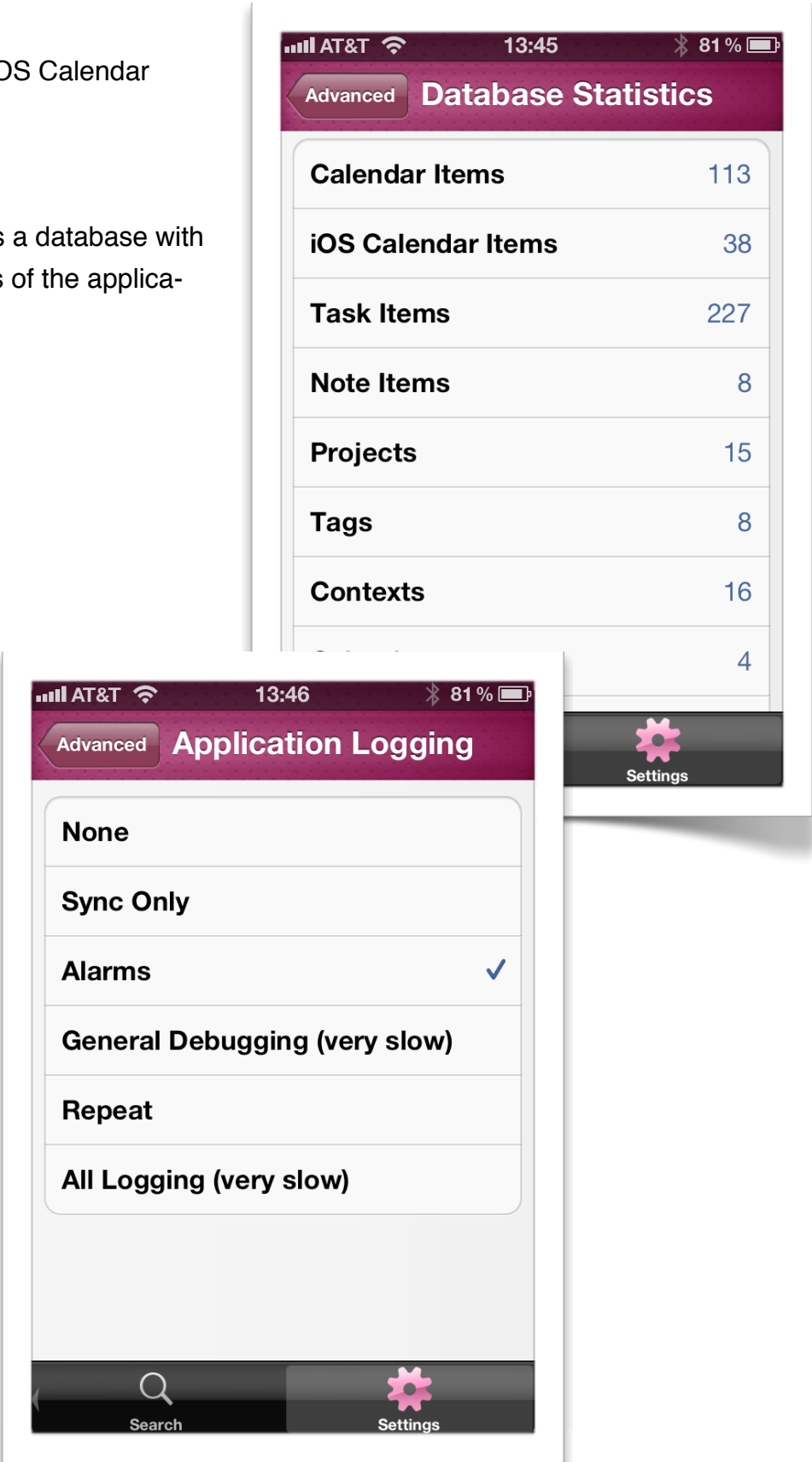
Notifications-The number reflects the number of alarms that have not yet “fired”. It does not include iOS event alarms but only alarms assigned to items in the Pocket Informant database.

Application Logging (General Settings)

This enables various levels of logging to allow the support staff of WebIS to help troubleshoot or explain any issues you might encounter while using Pocket Informant. In general, this setting should be left to "None". However, if you contact support, you might be asked to enable some level of logging for a period of time and then email those logs to us for analysis.

Allow Alarm Notifications For (General Settings)

This setting determines what items can have alarms attached to them. The default settings here are to have Event and Task alarms turned on.



Parent/Child Display (Task Settings)

This setting will determine how parent and sibling tasks are displayed in the task view when a child matches the current filter, but the parent does not. There are three choices: the first is None which will not display the siblings or parent; the second is Always Show Parent, this is the default setting and will show the parent only if the child matches; the third option is Always Show Parent and All Children, which will show the parent and the child tasks' siblings.

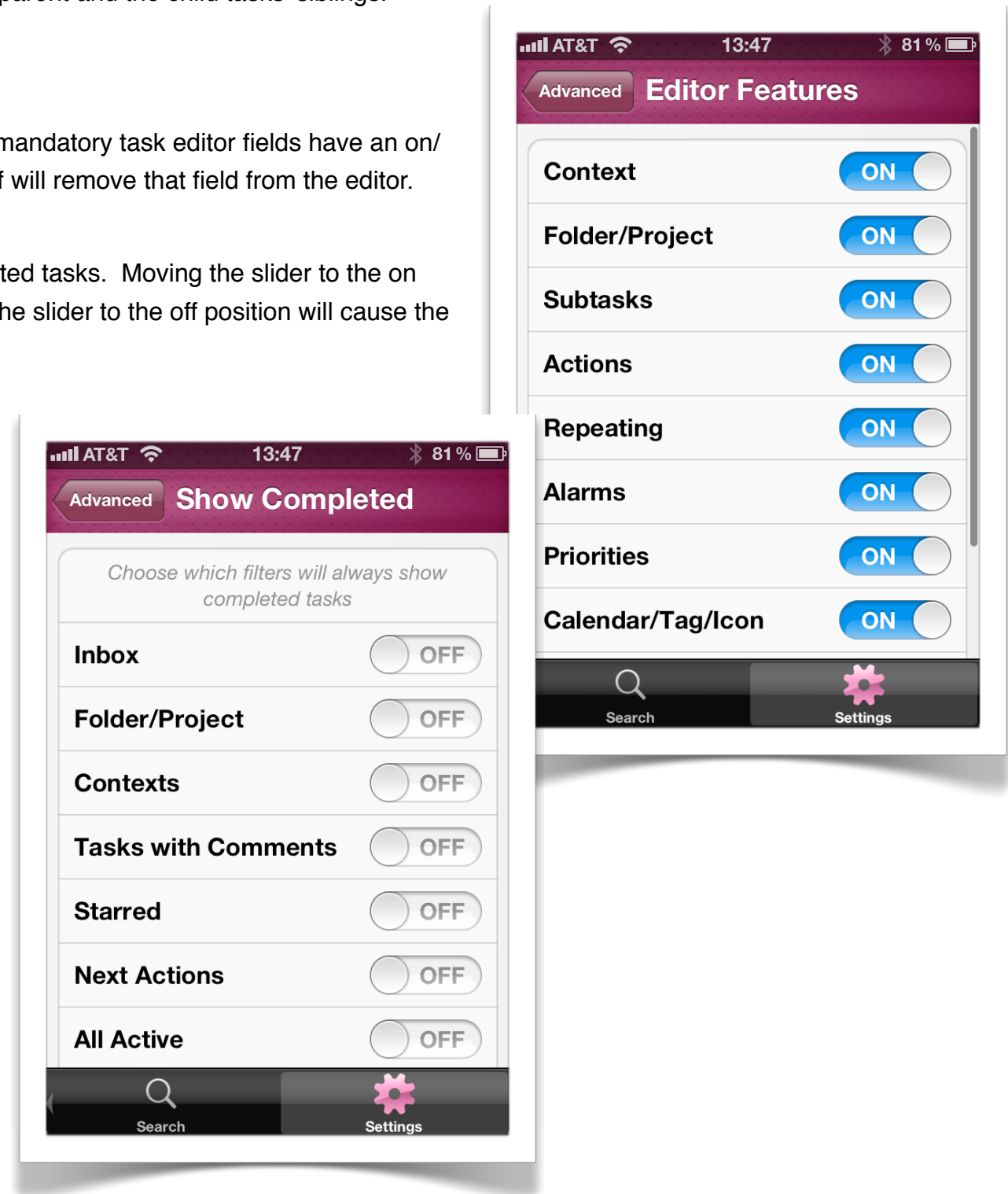
At all times if a parent matches a filter, all of its children will be visible.

Editor Features (Task Settings)

The settings here determine what fields are active in the task editor. Each of the non-mandatory task editor fields have an on/off slider. Moving the slider to on will make that field visible in the editor, sliding it to off will remove that field from the editor.

Show Completed (Task Settings)

This setting allows you to set what groupings inside of the Task View will show completed tasks. Moving the slider to the on position of a grouping will make the completed tasks visible in that grouping. Moving the slider to the off position will cause the tasks not to show in the selected grouping.



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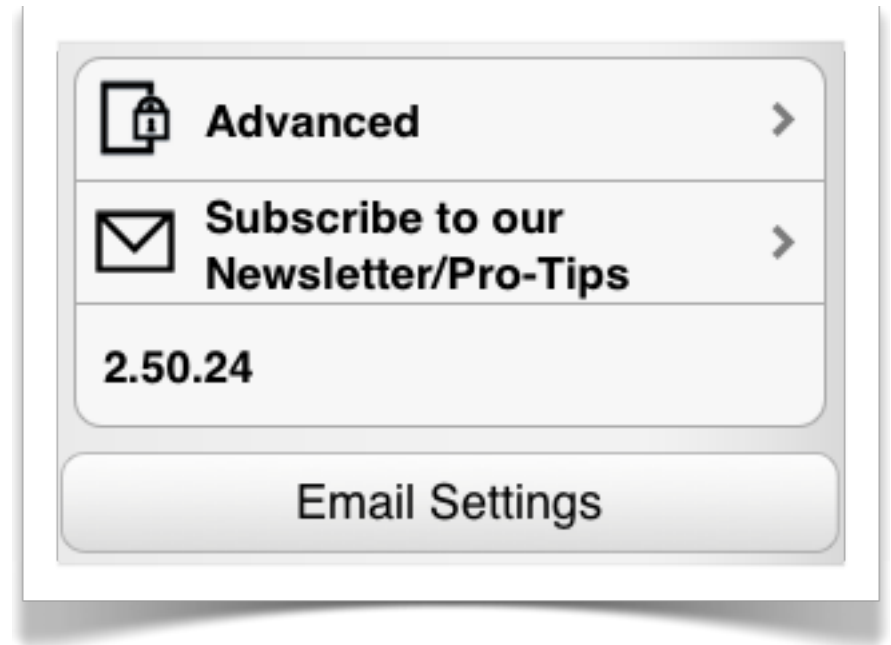
This is an in app option that allows you to subscribe to our monthly newsletter. The newsletter is packed with information that lets you know where Pocket Informant is going and provides detailed tips to make you a better Pocket Informant user.

Version Information

This is important so that you can verify the exact version and build of Pocket Informant that is being used. This is especially important information for any interaction that you may have with Technical Support. Also by tapping on the version information you can bring up the Pocket Informant tutorial video at any time.
(Beta version 2.50.24 shown)

Email Settings

This button will allow you to email your settings file for backup purposes or if you have other devices running Pocket Informant and would like to have the same settings on each you can email this file to that device and copy your settings. On the receiving device the method for installing the settings is as simple as clicking on the file in the email.



Limitations and Troubleshooting

In this chapter we explain the limitations of Pocket Informant and offer some troubleshooting tips for some of the most common issues.



Known Issues/Compatibility/Limitations

Using Pocket Informant brings you into a community of fellow users. There is a good chance that if you are having a difficulty that someone else has come across the identical or very similar situation, there is also a lot of “community” support for the varied ways people are using the application. Our forums <http://www.pocketinformant.com/Forums/index.php?s=cba2d2409826c2ecafc7ee353710c493&showforum=60> are a great source of help and general information to help you get the most out of your purchase.

Please look at our [list of knowledgebase articles](#) in case you have an issue, before you contact us for support.

MetaData

Metadata can only sync to one sync source. Changing the sync source of an item with metadata will not sync that metadata to the new sync source.

All Day Events Limit

In a single day Pocket Informant allows a maximum of 20 all day events.

iOS Events Do Not Sync

iOS Calendar events cannot sync with any of the sync services currently available in Pocket Informant. They are provided to Pocket Informant by directly accessing the iOS Calendar database.

Day View All Day Events Limit

In the Day View Pocket Informant can only display 3 all day events. More than 3 all day events will be indicated with a “more” button that can be used to view them.

When Deleting a Task Project or Folder that Syncs to ToodleDo

The tasks will be moved to the default list.

Once All Day Always All Day

With the exception of events on iOS calendars when a **recurring** event is set to the all day status that event will not be able to be edited back to a timed event.

Some of My Old Events Are Missing!!!

If you see this the first thing to check is the calendar that is missing the “older” events. It will likely be an iOS calendar and here is why. iOS events can be deleted by the iOS Calendar. There is a setting in the iOS (Device Settings) settings for Mail, Calendars, and Contacts, scroll down to the setting for calendars that is labeled sync here you can set the duration of old events to be shown. If your device calendar is set to sync with iCloud or if you sync with iTunes via the USB cable this setting will take effect the next time the iOS calendars sync.

If your missing events are not iOS calendar related please open a case with our support staff for further assistance.

iPad “No Theme” has no slide outs

When using the iPad version with the “No Theme” selected in widescreen mode you will not be able to access the slide out menu. This is due to the fact that in the “No Theme” you are given the screen real estate all the way to the edge of the screen leaving no room for a touch area to activate the slide out. To workaround this you can rotate into the portrait mode and tap the left arrow button to open the slide out menu or you can simple tap the widescreen button again from the landscape orientation to shrink the view down and bring up the slide out menu.

I just restored my settings but now WDS won’t work

Whenever you restore your settings, you will need to “re-pair” your device to your PC for WDS to operate. To do this go to the WDS sync in Pocket Informant and tap on the WDS sync, tap on the pair with desktop and re-do the steps for pairing, once this is done the sync should resume working properly.

Emailing Tasks with children or tasks with parents

If you email a task with children or child tasks with parents the recipient will need to tap each task to bring them into their Pocket Informant. At this time there isn’t a way to tap one of the family tasks and bring in all of the tasks.

On the iPad my left side view pane is almost blank?

This is a known issue, randomly when using an iPad in the landscape mode the left side pane in the Task View can lose all but one of its entries. We have been working on this issue but have not yet been able to correct it. When this occurs you will need to restart Pocket Informant to restore the view. From the main iPad screen double tap the home button, in the strip of icons hold the Pocket Informant icon until a red dash shows over it. Tap the red dash. Once the icon disappears tap the home button. Now from the main iPad screen restart Pocket Informant. The view on the left side pane will be restored.

I’m seeing a start up crash on my iPad after I restored the database

This issue is caused by a specific settings combination. It has happened randomly though so we’ve not been able to identify the specific settings that are causing this or the root cause in the code. We are working on this however if you run into this please do the following. Connect your device to iTunes, click on it, then click on the apps tab and scroll to the file sharing area and click on informant. Copy the file pim.informantdata to another location on your computer. Once that is done you will need to remove the application from your device. Now reinstall the application. Once installed go back to the file sharing area of iTunes and delete the informant file pim.intormant data and replace with your original copy. Now start Pocket Informant on your device, it should run fine and you data should be intact. If you have any difficulties with this please contact our customer support at webis.net.

Pocket Informant Says its Syncing and has for a long time but all is working...

Sometimes after a sync completes Pocket Informant may still indicate that it is syncing. If this is not the initial sync it should take less a couple of minutes to do an update sync. If the sync indicator is spinning longer than 5 minutes and this is not an initial sync you could be seeing the sync visual “hanging”. All other Pocket Informant functions should operate normally when this occurs. To fix this you will need to restart the application. From the main device screen double tap the home button, in the strip of icons hold the Pocket Informant icon until a red dash shows over it. Tap the red dash. Once the icon disappears tap the home button. Now from the main device screen restart Pocket Informant. The sync indicator should behave normally following these steps.

When Something Goes Wrong (Troubleshooting)

Occasionally when using Pocket Informant something does go wrong. When this happens the first step is not to panic. Total data loss is rare. Always keep in mind that just because you can't see your data at the moment it doesn't mean it's totally lost. Many users have hurt Pocket Informant by immediately posting negative feedback on iTunes when they cannot see their data assuming that all of their data is gone when in nearly every occurrence the data was able to be recovered. We have designed Pocket Informant to back up its data within the application and if you sync your data it should be backed up to the sync source, iTunes file sharing can store backup data as well and now Pocket Informant can now backup your data to DropBox. So with all of these backups and potential backups it is really difficult to lose all of your data.

Most problems are minor and so the first step in troubleshooting any computer issue is to reboot the device and see if the issue comes back. iOS Devices are no different from computers in this respect. Pocket Informant is a very complex application and sometimes it or the device can get confused and cause erratic behavior. So if you see an issue, just like on your computer at home try a reboot first and see if the issue returns.

Make sure that you are using the latest version of Pocket Informant that is available on iTunes and the latest releases of the iOS. To check and make sure you have the latest Pocket Informant release, go to the settings and look at the main settings screen. Near the bottom of the view will be the version number, take note of that number then go out to the App Store and search Pocket Informant, when you find it the version number will be displayed. If the version that you are using is a lower number than the one displayed please update and see if your issue persists.

Many of the tips below are from our excellent tech support department and are some of the most commonly seen issues.

I'm Syncing! (Syncs are not working)

Syncing is a mission critical part of Pocket Informant and can occasionally have difficulties for several different reasons.

If a sync fails, (all syncs except WDS) first please retry the sync perhaps on a different network or if your device has 3G/4G or LTE, try syncing on one of those services.

If the sync continues to fail, go to your Pocket Informant settings, advanced logging, and tap the option to log sync data. Then try the sync again, if it fails again (which it likely will) please go back to settings, tap help, then tap the action button in the top left of the view and tap the email logs button. Be sure to enter a detailed description of the problem and send that to us. This will automatically open a support case and will provide us with the initial data (log file) that we will need to see what is going and help us to find a solution.

For WDS sync it's best to go ahead and open a case with support as there are a great many more variables with this type of sync.

Crash When Viewing Contacts Photos

This is an issue that we are working to correct but have not fully resolved as of this writing. Below is an explanation of the issue and the current solution.

The issue is a corrupted image in the contacts database. The crash occurs in the actual iOS code for reading the image - deep in the guts of iOS. We've put all the safeguards around it and we cannot stop it from crashing.

The only known solution is to export all the contacts, reimport them which cleans them up. On OS X using iCloud we do this by exporting all contacts via vCard 3.0 format (which includes the images). Deleting them all in Contacts. Then importing them. Some people fix this by turning off contact sync on their iPhone and removing all contacts, and then turning sync back on.

Crash When Searching

You may encounter a crash when performing search operations. This particular crash is more of an inconvenience than anything. The reason why it still exists is because it happens so randomly that we've not really been able to establish a root cause as of this writing. We have made changes and improvements where we thought the issue was occurring and we have improved the search stability but in normal daily usage you may encounter a crash here.

Alarms Are Not Sounding

If for some reason your alarms set in Pocket Informant are not "firing" there are several places that you can check to make sure that they do fire. First is to go to the Pocket Informant Settings, Advanced, Database Management and tap the reset alarms button. This will refresh the iOS alarms manager and give all current alarm information to it.

Next, if that does not solve the issue, is to go to the Pocket Informant Settings, Calendar Settings, and make sure that the Alarm Notification Sound is set to one of the sounds and not to the "None" setting. Repeat this for the task settings.

If that is in order and the alarms still don't fire, go back to the Pocket Informant Settings, Advanced, Allow Alarm Notifications For, and make sure that both sliders are set to the on position.

The steps above cover all of the areas that alarms are controlled in Pocket Informant.

The next set of steps are for verifying that notifications are turned on for Pocket Informant in iOS.

In the settings of your device tap on Notifications and scroll down to Informant and tap on it. Now make sure that all of the sliders in this view are set to the on position. This will ensure that the iOS Notifications center is also set to fire all of the Pocket Informant alarms.

How To Move a Database

If you have emailed your database to yourself or you wish to copy your database to keep a backup please follow the directions listed below. First we'll talk about restoring the database. In this scenario you have either emailed the database to yourself or you want to install a backup copy of the database.

First connect your device to iTunes. Then double tap the home button of the device hold the Pocket Informant icon until a red dash appears over it. Tap that red dash and the icon should disappear. This will indicate that the application has been stopped and is not running in the background. Next, in iTunes click on the device, then click on the apps tab, then scroll to the mid way point of the page into the file sharing area. In that list click on informant. This will open a list of files. In this file list you will see a file named "pim.informantdata". That is the database for Pocket Informant. If you want to move the data simply right click on the file, and copy it then paste it to the location of your choice. Now you can resume using Pocket Informant...BUT if you want to load your copy of the database or use the copy of the database that you emailed yourself then do the following from exactly where you are at in the file sharing area of iTunes. Select the pim.informantdata file from the list and delete it. Now copy in the pim.informantdata file that either emailed yourself or copied from another location/device. Once this file is copied into place you can restart Pocket Informant. This operation does not move settings, or voice notes. Only the tasks, events, and text notes will be restored this way.

There is an alternate method for replacing the database from an email and this is to tap the database file in the email on the device. This should cause the database in the email to overwrite the database currently on the device.

About WebIS and Pocket Informant

We want to thank you for purchasing Pocket Informant. Behind Pocket Informant stands a team of developers, support specialists, marketing people and many others that strive together to make Pocket Informant the quality product that it is. Founded by Alex Kac in 1997 WebIS has consistently been a class leading producer of various mobile applications. With the advent and proliferation of the iOS and Android platforms Pocket Informant, in its various iterations, has become the main focus of WebIS. Pocket Informant was first produced for use on Windows based PDA's and eventually Smart Phones. From the Windows Mobile platform to various BlackBerry's, Androids and iOS devices Pocket Informant has brought with it a high level of sophistication with legendary customization and ease of use that has always set it apart from its competition. The Pocket Informant before you today was and the Pocket Informant of the future will be shaped by your feedback and suggestions. So we thank you for joining us on this journey, for those that have been with us from the Windows Mobile days of 1997 to those who are seeing Pocket Informant for the first time, hang on because it only gets better from here...

The Pocket Informant Family

In addition to Pocket Informant and Pocket Informant Pro we also have several other members that make up our Pocket Informant family. First is Pocket Informant GO!, this version of Pocket Informant is a universal application that will run on the iPad, iPhone and iPod touch. It is the entry level Pocket Informant application for the iOS devices. Scaled down from the original Pocket Informant and Pocket Informant Pro the GO! release packs plenty of planning power. Included with GO! is the week view for events, a task view that mirrors the Simple Task Mode from Pocket Informant, and the ability to sync with Pocket Informant Online, Google Calendar, Google Tasks, and Toodledo. GO! was designed with the user in mind that needs some of the features such as syncing but doesn't need advanced task management or multiple calendar views. With this much power and a value price we believe that GO! will introduce an entirely new group of users to the Pocket Informant family.

One of our newest family members is Pocket Informant Online. <http://pocketinformant.com/pio>, is our subscription only online service. This is the Pocket Informant cloud. It is the only available sync service that fully supports Pocket Informant for the iOS devices. In addition to the full syncing services Pocket Informant Online has a web interface that will allow you to enter, edit and manage your tasks and events.

Pocket Informant is also currently available for Android and BlackBerry devices. Please see our website <http://www.webis.net/> for more information.

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iCarousel version 1.5.2, August 2nd, 2011

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